RightNow Metrics™ 4.3

Internet Survey Tool for Customer Service

User Manual

For Microsoft Windows NT, 2000, and UNIX Operating Systems

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Preface

Welcome to RightNow Metrics™, the ground-breaking survey and measurement tool to keep your business activities on target. RightNow Metrics is designed to efficiently conduct online market research to measure customer satisfaction, collect market intelligence, and identify product and service enhancements.

Available in standalone mode or integrated with RightNow Technologies Internet-based customer service product RightNow eService Center™ or other customer relationship management (CRM) tools, RightNow Metrics provides Internet custom surveys to external and internal parties to gather important information for making business decisions. Integrated with RightNow eService Center, Metrics can, for example, automatically ask customers about the quality of service received or generate lists of customers with certain characteristics for follow-up contact. Some of the more common survey applications include customer and employee surveys, Web site feedback, product concept testing, opinion polls, and course evaluations.

About this Manual

This manual is a complete guide to successfully creating and executing email and Internet-based surveys through RightNow Metrics. The following information is contained in this manual.

Chapter 1, Executive Summary—This chapter contains an introduction to RightNow Metrics and a summary of the product.

Chapter 2, Getting Started—This chapter presents the user interface and introduces the key components of RightNow Metrics.

Chapter 3, Creating Surveys—This chapter contains overviews of the steps in designing a survey and creating a survey through the Create Survey wizard, including adding questions to the survey and launching a survey. Procedures in this chapter reference additional chapters where more detailed procedures are documented.

Chapter 4, Survey Workbench—This chapter describes the Survey Workbench in RightNow Metrics and contains procedures for creating survey layouts and launching surveys.

Chapter 5, Questions—This chapter describes the Questions console in RightNow Metrics and contains procedures for creating question libraries and creating and editing survey questions.

Chapter 6, Active Surveys—This chapter describes the Active Surveys console in RightNow Metrics, which is the main page for viewing the details and results of current surveys. Also included in this chapter are procedures for the functions that can be performed from this console.

Chapter 7, Results—This chapter contains procedures for displaying survey results. Examples of survey results in graphical, tabular, and comma separated value (CSV) format are also included in this chapter.

Chapter 8, Addresses—This chapter describes the Addresses console in RightNow Metrics, which displays a list of all the email addresses that received surveys or links to surveys. Also included in this chapter are procedures for performing tasks associated with maintaining and updating surveys' mailing list.

Chapter 9, Notification Console—This chapter describes the procedures for creating and editing email notifications.

Chapter 10, Integration—This chapter describes procedures for integrating RightNow Metrics with RightNow eService Center or another CRM application.

Chapter 11, Utilities—This chapter describes procedures for scheduling, manually running, and troubleshooting RightNow Metrics utilities.

Appendix A, Configuration Settings—This appendix contains information on each configuration setting used to customize RightNow Metrics.

Appendix B, Message Bases—This appendix contains information on each text string that is included in the message bases.

Appendix C, Predefined Questions and Surveys—This appendix contains a list of predefined questions and surveys included with RightNow Metrics.

Appendix D, Database Schema Tables—This appendix contains a list of RightNow Metrics schema tables and attributes.

Conventions

As you read RightNow Metrics 4.3 documentation, you will notice the following conventions:

Example	Describes
Path: Active Surveys>Usage	Identifies the path to access a page in RightNow Metrics, including any buttons or drop-down menus necessary to access a particular function. Paths appear immediately before the RightNow Metrics page.
Configuration>RightNow Metrics>General> Survey Settings>SURV_ADMIN_PASSWD	Identifies the submenus for configuration or message base settings accessed from the Configuration and Message Base Editors.
<angle brackets>	Indicates variable information specific to your RightNow applications.
New	Indicates a new feature in this release of RightNow Metrics.
Changed	Indicates a feature that has changed in this release of RightNow Metrics.

RightNow Technologies Documentation

RightNow documentation includes several manuals to help you install, administer, and use RightNow products, including RightNow eService Center, RightNow Metrics™, and RightNow Locator™. This documentation is written for RightNow users who have a working knowledge of their operating system and Web browsers, and are familiar with standard conventions such as using menus and commands to open, save, and close files.

RightNow eService Center

The following documentation is available for RightNow eService Center 5.5 (eService Center).

RightNow eService Center New and Expanded Features—This document contains descriptions of the new and expanded features of RightNow eService Center. This document is available in PDF format only.

RightNow eService Center SmartConversion Guide—This guide contains procedures on upgrading RightNow eService Center 5.0.x to RightNow eService Center, including the necessary updates and the areas affected by the upgrade. This guide is available in PDF format only.

RightNow eService Center Installation Guide—This guide contains procedures for installing eService Center on Windows NT, Windows 2000, and UNIX platforms.

RightNow eService Center Administration Manual—This manual contains procedures for administering, configuring, and customizing RightNow eService Center for your organization.

RightNow eService Center Customer Service Manual—This manual contains information and procedures for customer service representatives on getting started, end-user interface functions and features, adding and editing incidents, using RightNow Live, creating and editing views, and using the Customer Console.

RightNow eService Center Reference Manual—This manual contains eService Center reference material, including descriptions of management and custom reports and instructions for generating a report. Also included are procedures for modifying configuration settings using the Configuration Editor and descriptions of configuration settings, procedures for customizing text strings and buttons using the Message Base Editor, and procedures for modifying eService Center files using the File Manager.

RightNow eService Center Integration and Advanced Customization Manual—This manual contains procedures for integrating eService Center's Revelation™ knowledge engine with external systems, including help desks, data mining, and data reporting systems. Contact your Sales Representative for information on obtaining this manual.

Click the online Help tab on the end-user pages for information about using the end-user pages of eService Center.

Click the online Help button on the Workflow Rules, Escalation Rules, and Reports pages of eService Center for information specific to these features.

RightNow Metrics

RightNow Metrics can be used to efficiently conduct online research to measure customer satisfaction, monitor the effectiveness of your customer service department, and identify product and service enhancements. The following documentation is available for RightNow Metrics.

SmartStart™ Surveys**—**The SmartStart Surveys card contains valuable information about developing surveys using RightNow Metrics. It includes the steps necessary to plan your survey strategy and provides helpful tips for creating successful surveys.

RightNow Metrics Installation Guide—This guide contains procedures for installing RightNow Metrics.

RightNow Metrics User Manual—This guide contains procedures for successfully creating and executing e-mail and Web-based surveys.

Click the Help drop-down menu in RightNow Metrics to access online help.

RightNow Locator

RightNow Locator is RightNow Technologies' latest addition to its eService product line. RightNow Locator provides your customers with your organization's location information, including contact information, mapping, and driving instructions. The following documentation is available for RightNow Locator.

RightNow Locator User Manual—This manual contains procedures for configuring RightNow Locator to enable your customers to quickly find location information, access maps, and access driving directions. You can also chat with a RightNow Locator agent, or talk to a location directly through your PC. This document is available in PDF format only.

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Executive Summary

The Web's role as a medium for doing business continues to develop at an incredible pace. Just a few short years ago, companies saw the Internet as just a place to post information about their products and services. Then, everyone realized they could also transact business over the Internet, and e-commerce was born. Now, those same companies have come to realize that the Internet is a great medium for helping customers to help themselves—answering their own questions quickly online instead of depending on conventional call centers. These "e-service" applications have significantly reduced support costs while allowing customers to solve their own problems 24 hours a day, seven days a week.

There's just one problem with all this wonderful point-and-click business activity: If you're not careful, your customer service staff can quickly lose touch with your customers. Aside from the occasional angry email, they may never hear from their online constituency. And, of course, those angry emails put you in a reactive, rather than a pro-active mode. That's clearly not what customer delight is all about.

That's why online surveys are rapidly gaining favor with e-aggressive companies. These companies realize that such surveys provide a superb medium for assessing what is going on with customers. In fact, these companies have found several particularly compelling reasons to develop and deploy Internet survey applications. They include:

Immediacy of response

Instead of waiting for batches of responses to be returned from the field, the Internet allows customer service managers to watch survey results get tallied up in real time. High-traffic sites can post a survey and get data back within hours. This makes a huge difference in a business environment where a few days of delay can result in thousands of dissatisfied customers and the loss of millions of dollars in long-term revenue.

Real-time survey modification

Have you ever conducted a survey and, after you got the results back, realized it would have been better if you had asked one of the questions differently? Or maybe you got responses back that made you curious about how customers would feel about a possible solution to one of their grievances? Well, with online surveys, you can do exactly that. You can quickly modify questions or multiple-choice responses with a few keystrokes so that you can get the exact information you need, when you need it.

The ability to tailor surveys to customer behaviors

Want to know why some people leave your site after just a quick visit? Then why waste your time asking people who have stayed for 20 minutes? Want to talk to customers who are interested in one of your older product lines? Then why bother customers who aren't? With Internet surveys, you can select your respondent pool based on attributes or behaviors you capture from Web site visits. It's a more precise and less intrusive way to do business.

Increasingly representative survey base

As more customers use the Internet, they better reflect your overall customer base. So your online surveys are just as applicable to your non-Internet businesses as they are to your Internet ones. It's actually easy to compensate for any skew that results from the fact that your online customers may generally be wealthier – or younger, or more male – than your overall customer base. But those skews are becoming less significant as the Internet becomes increasingly popular across all demographics.

High response rates

One phenomenon we've noticed is that Internet users actually like to interact with companies over the Internet, so they're often more disposed to take a few minutes to click on some survey responses than they are to talk on the phone or return a hard-copy questionnaire. And the Internet also affords the ability to offer immediate-gratification rewards for responding, such as access to some special content area. We have often seen 15-20 percent response rates to electronic surveys.

Low cost

Conventional survey methods are relatively expensive – requiring printing, postage, telephone calls and / or lots of labor. Online surveys, on the other hand, cost very little. Once the necessary software is in place, they can be created and distributed virtually at will. This factor alone can contribute significantly to an organization's ability to develop a richer storehouse of customer satisfaction data.

In our organization's customer satisfaction strategy, the ability to query a customer immediately after we've provided them with some type of service or support has been particularly valuable for two reasons. First, because the survey is completed while the experience is fresh in the customer's mind, our surveys give us a more complete and accurate assessment of the service we provided. We don't have to rely on the customer's recollections about something that happened weeks or even months ago. Second, we've been able to track our responses consistently over time, so we've been able to quickly adapt our services and products to better meet changing demands. That's something we couldn't do if we were restricted to periodic surveys every few months.

There's also the human side to consider. Customer support can be a very difficult job, since there is so much focus on negative experiences. By doing continuous satisfaction surveying, we've found that we've given our support representatives the opportunity to hear from satisfied customers throughout their day.

The potential business benefits of continuously measuring customer satisfaction using the Internet, email and/or instant messaging are huge. Understanding and responding to customer needs is critical to short-term success and long-term survival. If you're looking to build a world-class service organization, the information you can get from your wired customers is of superlative value. Plus, the tools necessary to do so are readily available and easy to deploy. So don't let the Internet distance you from your customers. Use it to get closer to them than ever.

Getting Started

Used in standalone mode or integrated with RightNow eService Center or another CRM program, RightNow Metrics can assist you with every decision your organization makes. You can use RightNow Metrics to efficiently conduct online research to measure customer satisfaction, monitor the effectiveness of your customer service department, and identify product and service enhancements. You can instantly survey Web site visitors on everything from customer service satisfaction to product design and demographics. And your online response volume and speed will far exceed results from traditional survey methods.

The wizards in RightNow Metrics assist you in creating surveys, creating questions, and launching surveys. The Creating Survey wizard is your starting point for creating a survey and can walk you through the entire process, including selecting or creating questions to include in your survey, choosing a distribution method, and determining when to send it. (Chapter 3 contains instructions for invoking the Creating Survey wizard and creating a survey.)

RightNow Metrics also provides configuration settings and message bases to customize the functionality and text strings of the product to meet your specific needs. You can easily generate and search reports to find specific information you want to modify. For default settings and procedures on generating reports for configuration settings, refer to Appendix A, “Configuration Settings.” For information on message bases, refer to Appendix B, “Message Bases.”

This chapter contains procedures for starting your RightNow Metrics application installed in standalone mode and integrated with RightNow eService Center for the RightNow Technologies hosted environment and UNIX and Windows NT/2000 platforms. (For information on installing RightNow Metrics, refer to the *RightNow Metrics 4.3 Installation Guide*.)

Also included in this chapter are descriptions of the user interface and the main components of RightNow Metrics. For survey tips and information on planning your survey strategy, refer to the *SmartStart Surveys* card. Use this card to plan your RightNow Metrics survey strategy. Pre-planning will save you time later on and help you implement a successful survey strategy. Refer to Chapter 3 for an overview of the steps in designing a survey.

Logging in to RightNow Metrics

The instructions contained in this section include logging in to RightNow Metrics installed in standalone mode and integrated with RightNow eService Center 5.5.1 or higher. Refer to the logging in instructions for your particular RightNow Metrics application.

Note: If you have upgraded from a previous version of RightNow Metrics and have integrated with eService Center, any existing surveys in your database were automatically assigned to the Metrics administrator. Refer to the *RightNow Metrics 4.3 SmartConversion Guide* available for download from our Web site at http://rightnow.custhelp.com for more information. The *SmartConversion Guide* also contains information about integrating with eService Center or integrating with another CRM program.

Logging in to RightNow Metrics Installed in Standalone Mode

You can start RightNow Metrics from your Web browser by entering the URL of your RightNow Metrics site. The URL contains your interface name, which is also the name of your configuration directory. For more information, refer to the checklist contained in the *RightNow Metrics 4.3 Installation Guide.*

To log in to RightNow Metrics installed in standalone mode :

1. Once you have installed and configured RightNow Metrics, type the URL for your particular installation:

   RightNow Technologies hosted environment

   ```
   http://<your_interface>.custhelp.com/cgi-bin/<interface>.cfg/
   metrics
   ```

   Note: Contact your customer service representative to obtain your URL for sites hosted by a facility other than RightNow Technologies.

   UNIX

   ```
   http://<your_domain>/cgi-bin/<interface>.cfg/metrics
   ```

   Windows NT/2000

   ```
   http://<your_domain>/scripts/<interface>.cfg/metrics.exe
   ```

2. Press **Enter** to open the Metrics Login page.

Figure 2-1: Metrics Login Page

3. Type your RightNow Metrics login password (if defined) and click Login. The Active Surveys page will open.

   Note: There is no password until you specify one in the following configuration setting: RightNow Metrics>General>Settings>SURV_ADMIN_PASSWD

Logging in to RightNow Metrics Integrated with RightNow eService Center

When you integrate RightNow Metrics 4.3 with eService Center, you can share the eService Center staff accounts information. Staff members from eService Center with proper permissions in their profile can log in to RightNow Metrics using their eService Center user name and password. For information about integrating RightNow Metrics with eService Center, refer to Chapter 10 in this manual.

Before eService Center staff members can successfully log in to RightNow Metrics, they must have the appropriate profile settings. Therefore, you must first log in to eService Center and assign staff members RightNow Metrics privileges.

There are two options in eService Center that allow access to RightNow Metrics:

- **Metrics Administrator**—This setting allows a staff member with the current profile complete access to RightNow Metrics. This includes being able to view, access, assign, and edit all launched and unlaunched surveys, regardless of which staff member created them.
- **Metrics User**—This setting allows a staff member with the current profile limited access to RightNow Metrics. Staff members with this profile are able to view, access, and edit only those surveys created by them.

As shown in Figure 2-2, these profile settings are available through the Profiles—Edit page.

Path: eService Center URL> >Staff Management>Profiles> Edit

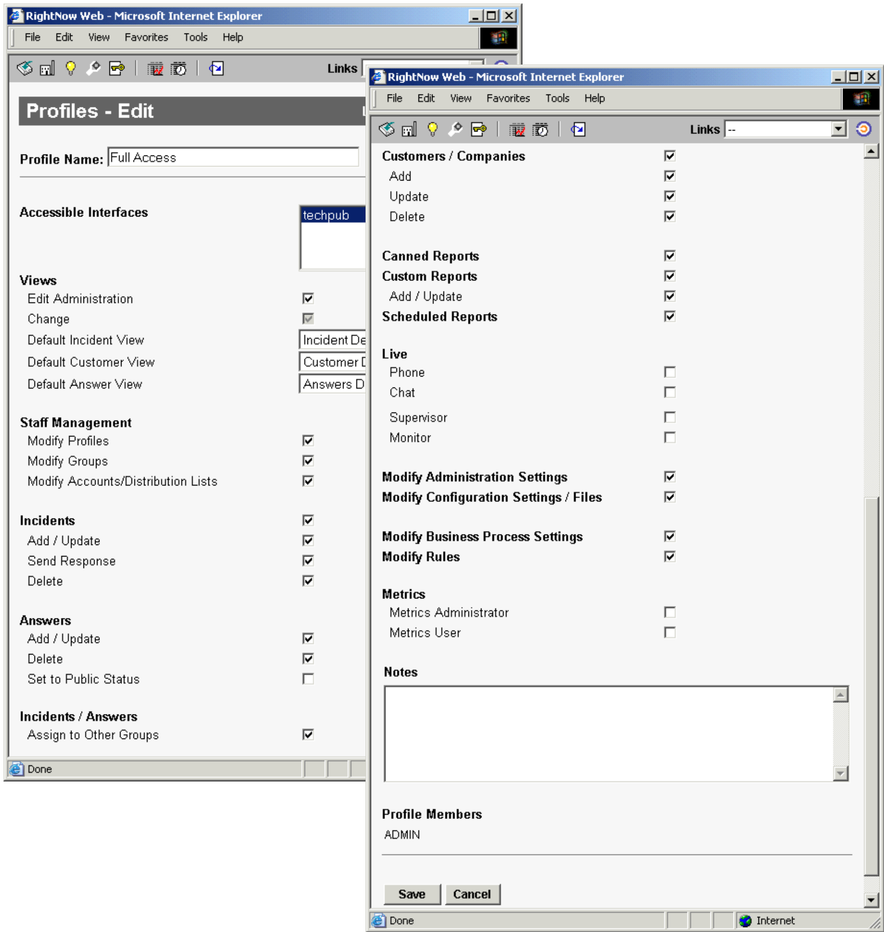


Figure 2-2: eService Center Profiles—Edit Page

You can edit the profile setting by clicking either Metrics Administrator or Metrics User on the Profiles—Edit page. All staff members assigned to this profile will be able to log in to RightNow Metrics using their eService Center user name and password. For more information on profiles, refer to the *RightNow eService Center 5.5 Administration Manual.*

Note: When performing the integration, RightNow Metrics will create a new staff member, group, and profile in RightNow Metrics. The profile, “METRICS,” has full access in eService Center, including Metrics Administration permissions. The staff account, also called “METRICS,” is assigned to this new profile, as well as the new group, “METRICS.”

To log in to RightNow Metrics integrated with RightNow eService Center

1. Log in to RightNow eService Center as a user with full administration privileges (admin).

2. Click to open the Management and Configuration page.
3. Click Profiles under Staff Management.
4. Click Edit next to Metrics Admin. Assign at least one staff member to this profile to allow full Metrics administration privileges.

   Note: All surveys are initially assigned to the administrator (Admin).
5. Assign other staff members to the Metrics User profile or another profile that contains Metrics User privileges. These staff members can then view, access, and edit only those surveys created by them.
6. Once you have finished assigning your staff members to the appropriate profiles, you are ready to log in to RightNow Metrics. See "To log in to RightNow Metrics installed in standalone mode :" on page 2-2.

   Note: At the Metrics login screen, use your eService Center user name and password (if defined).

Path: Metrics Login> Login

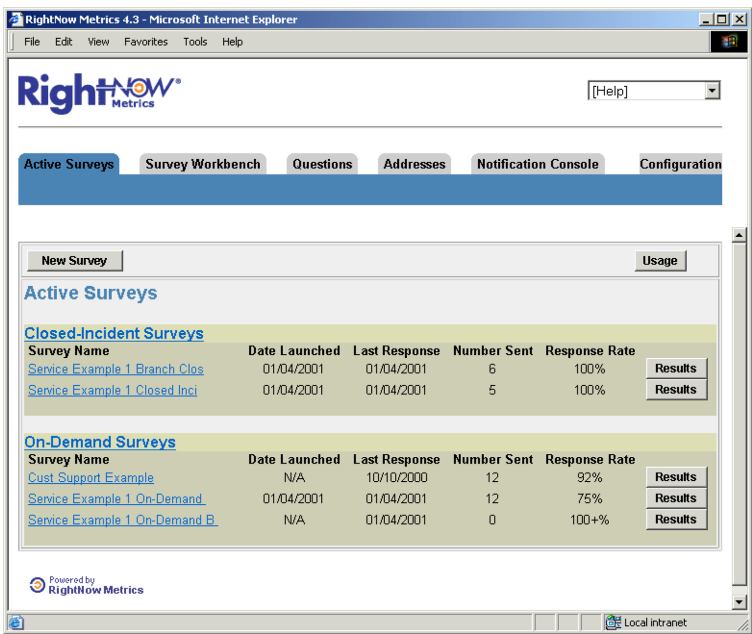


Figure 2-3: Active Surveys—Entry into RightNow Metrics

The user interface is straightforward and easy to navigate with tabs on the navigation bar that link to the main components. The navigation bar appears on most pages in RightNow Metrics except on specific wizard windows when creating surveys, questions, libraries, or launching surveys.

Navigating the User Interface

RightNow Metrics is designed so you can create and manage surveys from different areas in the interface; for example, you can create and preview surveys from both the Active Surveys page and the Survey Workbench, and you can create questions from the Questions page as well as from the Survey Workbench. You can quickly move back and forth between components and know exactly where you are at all times. Whatever approach you use to create and manage surveys and questions, RightNow Metrics can adapt to your approach. General navigation in RightNow Metrics is illustrated in Figure 2-4.

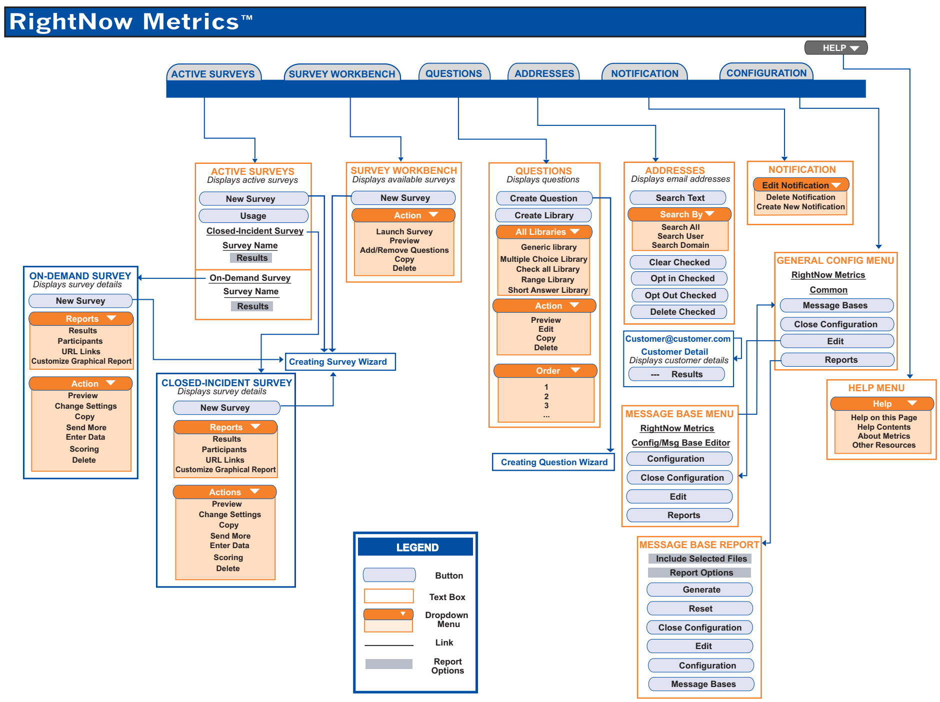


Figure 2-4: Navigating the Interface

Take some time to move around RightNow Metrics to become familiar with the interface.

RightNow Metrics Consoles

The consoles in RightNow Metrics consist of Active Surveys, Survey Workbench, Questions, Addresses, Notification Console, and Configuration. A Help drop-down menu is also available at the top of most pages and contains online help for the page you are currently viewing and general help information.

This section contains a brief overview of the consoles and lists the tasks you will generally perform from each.

Active Surveys

As the entry point in RightNow Metrics, the Active Surveys page displays information about all current Closed-Incident and On-Demand surveys. From this page you will manage your active surveys and view or export survey results. The tasks you can perform from Active Surveys include:

- View the details of each survey (number of surveys sent and received, the date the survey was activated, and how the survey was distributed).
- View the results of surveys in a variety of formats.
- Export survey results in a format you choose.
- Assign weights to questions to score multi-question surveys.
- Set up notification workflow rules when survey responses meet specified criteria.
- Send surveys to additional email addresses.
- Manually enter survey results for anonymous surveys.
- Create new surveys using the Creating Survey wizard.

For complete information on Active Surveys, refer to Chapter 6.

Survey Workbench

The Survey Workbench is the main tool for choosing survey layout, editing surveys, and launching surveys. From the Survey Workbench you can perform the following tasks:

- Create a survey layout, including adding questions, pages, and branches to a survey.
- Add questions to or remove questions from a survey that has not been launched.
- Preview, copy, and delete surveys.
- Launch surveys (define survey settings, including survey type, distribution method, and when to send a survey).
- Create new surveys using the Creating Survey wizard.

For complete information on the Survey Workbench, refer to Chapter 4.

Questions

The Questions console displays a list of all questions in your database, the type of question, which library each question is stored in, and which survey each question is in. From the Questions page you can perform the following tasks:

- Create questions using the Creating Question wizard.
- Create libraries for categorizing and storing all of the questions in your database.
- Check question formatting and HTML code.
- Edit and delete questions.

For complete information on the Questions console, refer to Chapter 5.

Addresses

The Addresses console in RightNow Metrics provides instant access to your surveys' mailing list to track and update email addresses. The tasks you will perform from this page include the following:

- Search the mailing list by domain, user name, or both.
- Exclude email addresses from receiving surveys or links to surveys from RightNow Metrics.
- Delete individual email addresses or groups of addresses.
- View surveys received from each email address.

For complete information on the Addresses console, refer to Chapter 8.

Notification Console

The Notification Console displays a list of surveys containing email notifications along with the email addresses of the notification recipients. From the Notification Console you can create, edit, and delete email addresses defined in email notifications. Email notifications are used with notification rules.

Notification rules define the criteria under which an email notification will be sent to staff members. Rules can be used with the scoring feature to notify staff members when an overall survey score or individual question score is unusually high or low. Rules can also be used to notify staff members when there are problems with the network, server, mailbox, or password when sending or receiving surveys. For complete information on the Notification Console, refer to Chapter 9. For information on notification rules, refer to Chapter 6, "Active Surveys."

Configuration

This tab opens the Configuration and Message Base Editors. The Configuration Editor allows you to configure directories, database settings, system security, and other settings that control display and survey functions. The Message Base Editor enables you to specify text values for the program buttons, headings, and text. You can change configuration settings and message bases at any time. Refer to Appendix A, "Configuration Settings" and Appendix B, "Message Bases" for a list of the configuration settings and message bases in RightNow Metrics.

Help

The online Help drop-down menu contains information about using RightNow Metrics, including links to online help and the RightNow Metrics tutorial. The Help menu also contains information about RightNow Metrics and other RightNow Technologies products and a link to the RightNow Metrics customer support Web page.

Creating Surveys

Developing a successful survey requires that you first define your survey purpose. With a clear goal in mind, you will get the most out of RightNow Metrics and gather valuable information from your customers and potential customers. Review the survey tips contained in the *RightNow Metrics SmartStart Surveys* card and complete the survey strategy for useful information about designing surveys and survey questions.

Creating surveys in RightNow Metrics consists of five primary tasks:

- Design the survey (see “Designing a Survey for RightNow Metrics” on page 3-4).
- Create the survey (see “Creating a Survey” on page 3-10).
- Create questions and add questions to the survey (see “Creating Questions” on page 3-14 or Chapter 5, “Questions”).
- Create the survey layout (see “Defining the Survey Layout” on page 3-18).
- Launch the survey (see “Launching a Survey” on page 3-22).

This chapter is divided into two main sections. The first section contains an overview of the steps in designing a survey. You will want to complete the design process before you create your survey. The second section contains an overview of the steps in creating a survey using the RightNow Metrics wizards.

Note: Other chapters in this manual contain more detailed procedures for each task in the process and are referenced in this chapter.

Key Terms

Before you begin the process of creating a survey, you will want to become familiar with the terminology used throughout this manual. Some definitions are repeated in other chapters for clarification.

Distribution methods:

> **Email**—A method for distributing surveys. Surveys distributed as email are sent to participants as plain text through email. Respondents do not need a Web browser to answer email surveys; they simply reply to the email by entering the number of their choice or short answer in the space below the question and options.
>
> **Email HTML**—A method for distributing surveys in an email that contains either an ASCII text URL for the survey or a Web version of the survey. If the customer’s email client is capable of displaying HTML, the customer will see the survey. If the customer’s email client does not support this functionality, the customer will see the ASCII text URL.
>
> **Email Link**—A method for distributing surveys in which surveys are displayed on a Web page. Links to surveys can be sent in email, placed on a Web page, and built into a hyperlink for accessing a Web page.

Launching a survey—The process of defining the characteristics of a survey, including the type of survey, how the survey will be sent (what method of distribution), and when it will be sent.

Question types:

Check All—A question that has a number of specified answer choices in which the respondent can check all answers that apply.

Multiple Choice—A question that has specified answer choices in which the respondent can choose only one.

Range—A question that has a specified numerical range of answer choices. Range questions commonly pertain to rating product satisfaction or the performance of a customer service representative.

Short Answer—A question without any specified answer choices in which respondents answer in their own words.

New

Space—A question type that is used to add extra lines between survey questions.

Text—A formatting feature for adding text or graphics between survey questions. You can use a text block to add instructions for upcoming questions or to add design features to enhance your surveys.

RightNow Metrics wizards:

Creating Survey wizard—An interactive utility for creating a survey; the starting point in the creating survey process.

Creating Question wizard—An interactive utility that assists you in creating questions.

Creating Library wizard—An interactive utility for creating libraries for organizing and storing questions.

Launching Survey wizard—An interactive utility for defining survey settings, including type of survey, distribution method, and when the survey will be sent.

Survey layout types:

Single-Page—A layout type for surveys distributed by email in which all questions are on one page.

Multiple-Page—A layout type that contains more than one page. Multiple-page surveys contain one line of questions and can be effective in breaking up large surveys.

Branching—A layout type that directs the flow of questions based on the responses chosen by survey participants. Incorporating Web-based tree logic, this layout type enables branches and pages to be created that include more than one line or branch of questions. Branches can be created for range and multiple choice questions.

Survey tracking:

Targeted—An option in an On-Demand survey distributed as an email link or email HTML. In targeted tracking, only those persons who were specifically sent the survey are allowed to respond. The email addresses are placed in the database, and a list of the email addresses for those who responded to the survey can be viewed.

Anonymous—An option in an On-Demand survey distributed as an email link or an email HTML. In Anonymous tracking, the email addresses of the respondents are not necessary for them to respond to the survey; therefore, the list of respondents' email addresses is not stored in the database.

Survey types:

Closed-Incident survey—A survey that is automatically emailed to your customers after the questions they submit have been answered and their incidents have been solved by a customer service representative. Closed-Incident surveys can be used when RightNow Metrics is integrated with RightNow eService Center or another customer relationship management package. This type of survey enables you to get automatic customer feedback and then instantly tabulate and display the results. Several different Closed-Incident surveys can be defined and sent depending on incident-specific parameters.

On-Demand survey—A survey for measuring customer satisfaction, opinions, product intelligence, or any other area of interest. On-demand surveys can be created for RightNow Metrics installed in either standalone mode or as an add-on module to RightNow eService Center. On-demand surveys can be part of a Web site or emailed to customers.

The next section contains an overview of the steps in designing a survey.

Designing a Survey for RightNow Metrics

The flexibility of RightNow Metrics enables you to survey your customers and Web site visitors in a variety of ways. No matter what your survey strategy is, RightNow Metrics has the tools to accomplish your goals. RightNow Metrics also provides predefined questions and sample surveys packaged with your product. A list of questions and surveys are included in Appendix C, "Predefined Questions and Surveys." These surveys and questions can easily be modified to fit your survey strategy.

Before you invoke the Creating Survey wizard that will lead you through each task in creating a survey, you should identify the goals for your survey and the audience you want to target. Once your goals and audience are defined, answer the following questions:

- What type of survey do you want to create?
- What types of questions do you want to include?
- How will you distribute the survey?
- What type of layout will work best for this particular survey?

Choose a Survey Type

Begin by choosing a survey type, either Closed-Incident or On-Demand. Each survey type is targeted for a specific audience. Closed-Incident surveys are an effective way to get immediate feedback on customer service while the experience is fresh in the customer's mind. On-Demand surveys are effective for surveying customers and Web site visitors on a variety of topics and can be part of your Web site or sent in an email.

Determine Appropriate Question Types

Questions are the foundation of any survey, and determining what type of questions to include in your survey is the next step. Identifying what feedback you want will determine the question type to use. RightNow Metrics offers six question types:

Range—A question type that has a specified numerical range of answer choices.

Short Answer—A question type without any specified answer choices in which respondents can answer in their own words.

Multiple Choice—A question type that has specified answer choices in which respondents can choose only one.

Check All—A question type that has specified answer choices in which the respondent can choose as many as apply.

Text—A formatting feature for adding text or graphics between survey questions.

New

Spaces—A formatting feature for adding extra spaces between survey questions.

You can easily create questions to add to your survey either while creating a survey or independent of your survey using the Creating Question wizard. You can also create libraries to store and categorize your questions. Refer to Chapter 5 for samples of each question type.

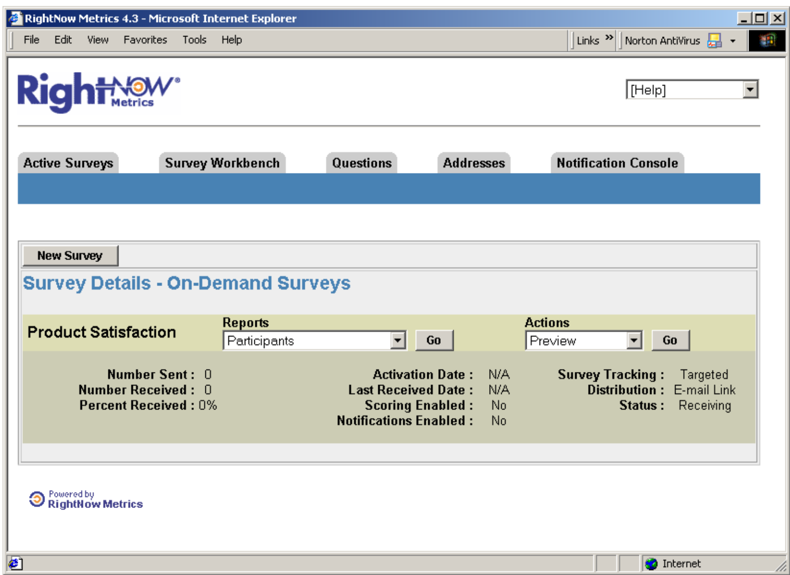
Determine the Distribution Method

The decision about what method to use to distribute a survey should be made in conjunction with the survey layout you choose (specifically, the number of pages and branches you want in the survey).

The following pages describe each distribution method to provide you with the necessary information for laying out a survey and selecting an appropriate distribution method. Survey examples using each distribution method are also included.

Email Link

You can distribute both survey types (Closed-Incident and On-Demand) as email links. Once an On-Demand email link survey is launched, a link is constructed that can be viewed from the Survey Details page (shown below).



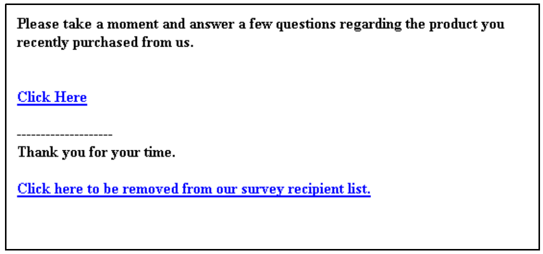
The survey is displayed as a Web page and a link to the survey can be used in the following ways:

- The link can be placed on a Web page for Internet users to access.
- The link can be triggered from an Internet user spending time on one particular Web page or Web site. (For more information on configuring pop-up surveys, consult your webmaster.)
- The link can be built into a hyperlink for accessing a Web page. For example, when a user clicks a link to access a Web page, the survey is activated and displays.
- The link can be inserted through RightNow Metrics or an external email program and sent to targeted participants. The link can be inserted in an email or included on an HTML page that hides the link behind a graphic, such as a button. When the recipient clicks on the

hyperlink contained in the email, the Email Link survey opens through a Web browser.

Note: A cookie is placed on the participant's computer to prevent them from answering the same survey more than once.

The following shows the body of an email containing a survey link.



Please take a moment and answer a few questions regarding the product you recently purchased from us.

[Click Here]

Thank you for your time.

[Click here to be removed from our survey recipient list.]

Figure 3-1: Email Link Distribution

Email HTML

You can send both surveys types (Closed-Incident and On-Demand) as email HTML. This method distributes your survey in an email to your customers that contains either an ASCII text URL for the survey or a Web version of the survey. If the customer's email client is capable of displaying HTML, the customer will see the survey. If the customer's email client does not support this functionality, the customer will see the ASCII text URL.

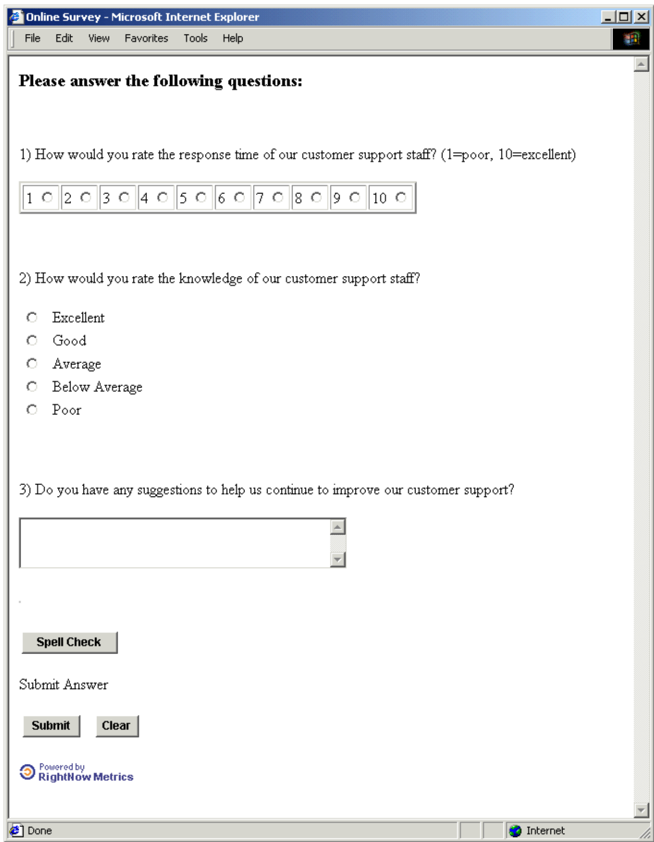


Figure 3-2: Example Survey—Email HTML Distribution

Email

For your customers who do not have Internet access, RightNow Metrics provides the Email distribution method that can be used for either Closed-Incident or On-Demand surveys. Surveys using this distribution method are sent to participants as ASCII text. Respondents do not need a Web browser to answer email surveys; they simply reply to the email and enter the number of their choice or short answer in the space below the question and options.

Due to the nature of email, surveys sent using this distribution method do not support conditional branching or required questions. In addition, when using the Email distribution method, you cannot choose between Targeted and Anonymous tracking types because participants access the survey only by email.

For information on Targeted and Anonymous tracking types, refer to “Launching an On-Demand Survey” on page 4-40.

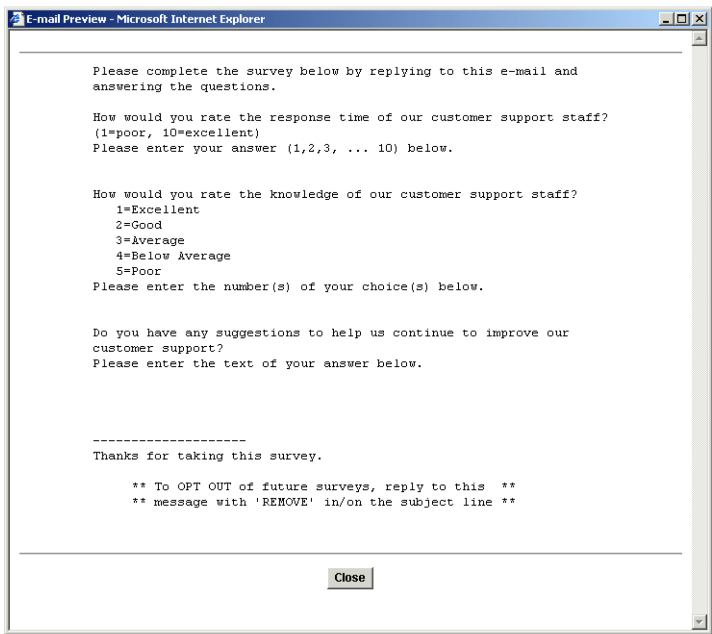


Figure 3-3: Example Survey—Email Distribution

Choose the Survey Layout Type

Once you have an idea of the type of questions to include in your survey and how you’ll distribute it, think about how you want to present your survey. RightNow Metrics provides three survey layouts to enable you to effectively customize each survey. Surveys can contain a single page, multiple pages, or multiple pages with branches. The layout you choose will depend on the method of distribution you choose and the number of questions in your survey.

When to use a single-page layout:

A survey with a single-page layout should be used for surveys distributed by email and email HTML. Due to the limitations of email, surveys distributed by email or email HTML support only one page. A single-page layout is also a good choice for surveys that contain a small number of questions.

When to use a multiple-page layout:

A survey with a multiple-page layout can be used only for surveys distributed by email link. With a multiple-page layout, you can easily group related questions, effectively break up longer surveys into manageable pieces, and provide ample white space on each page.

When to use a branching layout:

The branching layout can be used only with surveys distributed by email link. The branching layout allows you to add branches to questions to direct the flow based on responses the participant chooses. In this way, participants do not have to answer questions that are not relevant to them.

For example, if a survey question asks whether or not participants have purchased one of your products and they answer “No,” they would skip the questions pertaining to which products they own and when they were purchased. Participants who answer “Yes” would answer those questions.

Here’s how branching works. Each branch links to a page in the survey layout based on a specific answer choice. Multiple branches can be added to one question, with each branch based on a separate answer choice.

Pages are the target location of branches and consist of the question(s) relevant to that branch. Each page containing a branch also has a target page that is displayed when a participant completes the questions on a page that does not take a branch. The flow of questions can be completely controlled using branches and pages.

Now that you have answered the basic questions regarding your survey design, you are ready to create the survey.

Creating a Survey

The Creating Survey wizard is your starting point for creating a survey; the wizard leads you through the entire process from naming your survey and creating questions to defining the survey layout and launching your survey.

The remainder of this chapter describes the process of creating a survey using the RightNow Metrics' wizards:

- Create a survey (see "Launching the Creating Survey Wizard" on page 3-11).
- Create questions for your survey ("Creating Questions" on page 3-14).
- Add questions to your survey and define the survey layout ("Defining the Survey Layout" on page 3-18).
- Launch your survey ("Launching a Survey" on page 3-22).

Review the sections in the order presented to gain a clear understanding of creating a survey using the RightNow Metrics wizards.

Launching the Creating Survey Wizard

Once you log in, RightNow Metrics presents a straightforward interface for navigating the product. Active Surveys is your starting point for performing all functions in RightNow Metrics.

To begin the process of creating a survey, you will invoke the Creating Survey wizard and name your survey. (You can also access the Creating Survey wizard from the Survey Workbench.)

Path: Metrics Login>Active Surveys

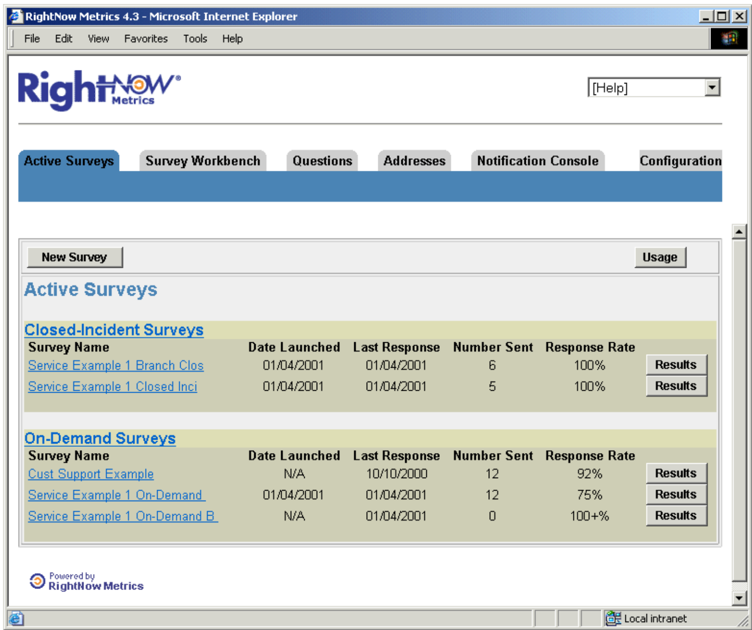


Figure 3-4: Active Surveys Page–Your Starting Point

To create a survey:

1. Click 

to invoke the Creating Survey wizard.

Path: Metrics Login>Active Surveys> New Survey

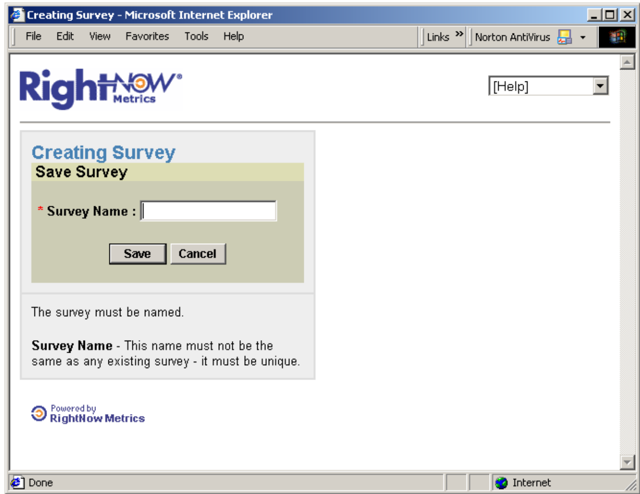


Figure 3-5: Creating Survey Wizard—Name the Survey

2. Type the survey name and click Save. This opens the Survey Layout page.

Path: Active Surveys> **New Survey** > **Save**

Changed

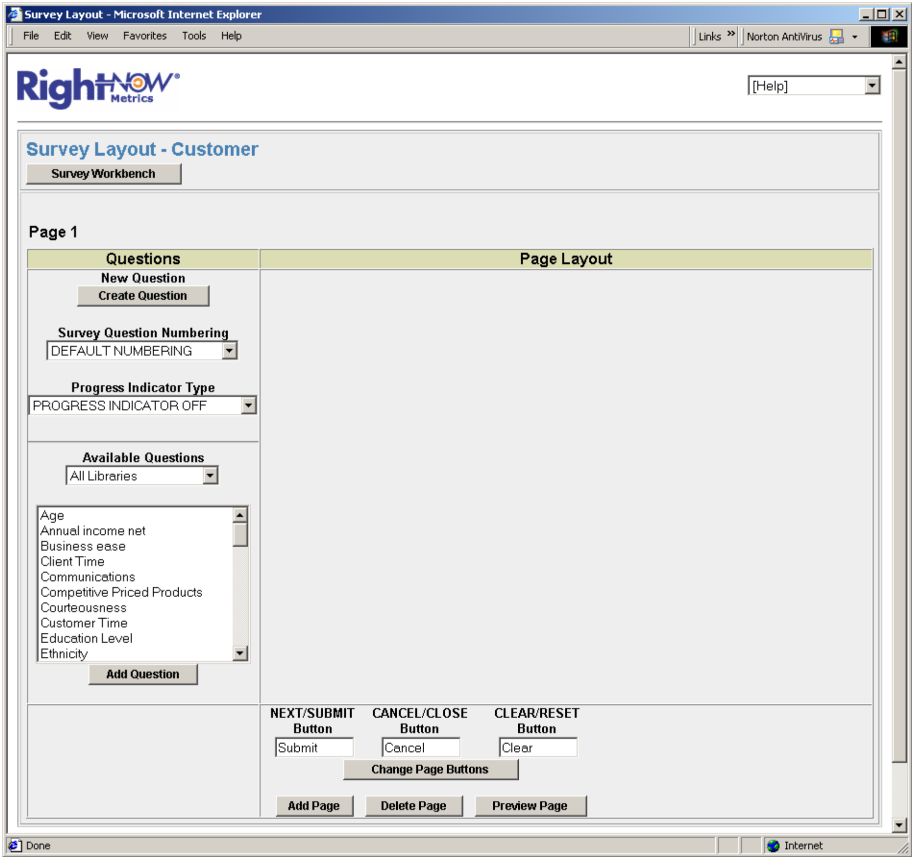


Figure 3-6: Survey Layout Page—Add Questions to the Survey

From the Survey Layout page, you can create questions for your survey or add existing questions. Refer to Table 4-2, “Survey Layout Page Field Descriptions,” on page 4-9 for descriptions of the fields and buttons on this page.

In the next section we will create a question for the survey using the Creating Question wizard.

Creating Questions

By this time in the creating survey process, you should have a clear goal for your survey, know the audience you are targeting, and have a general idea of the type of questions you plan to include. RightNow Metrics provides a variety of question types and a simple way to create questions. Using the Creating Question wizard, you can define each element and characteristic of a question; in addition, you can go back to the previous page in the wizard and make changes at any time during question setup.

Note: For instructions on creating each type of question, refer to Chapter 5. For general information about the question types available, refer to "Determine Appropriate Question Types" on page 3-4.

To create a question:

1. From the Survey Layout page, click Create Question to launch the Creating Question wizard.

Path: Survey Layout> Create Question

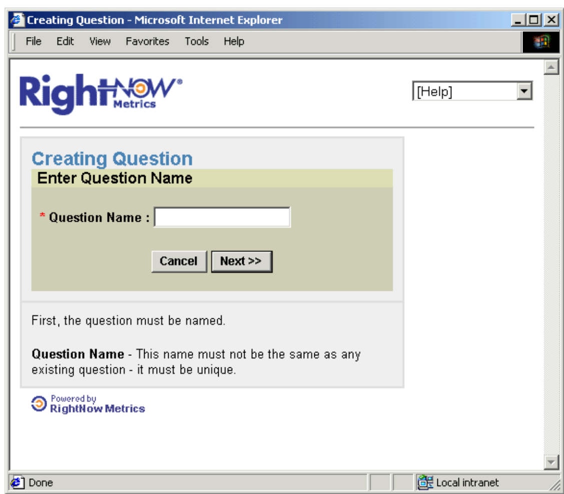


Figure 3-7: Creating Question Wizard—Name your Question

To cancel at any time and return to the Survey Layout page, click Cancel.

2. Type the name of the question and click Next >.

Path: Creating Question

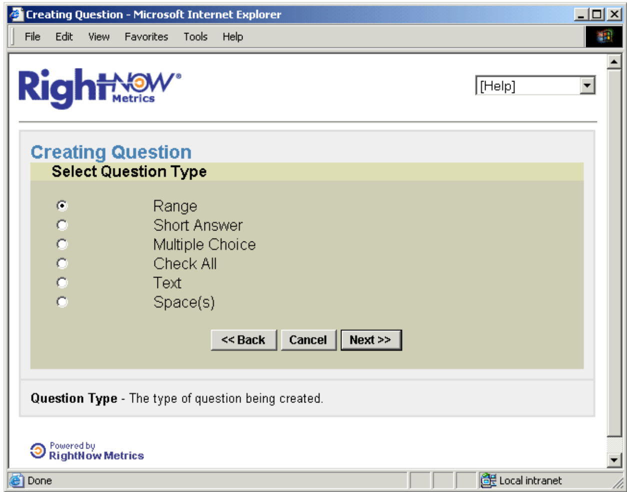


Figure 3-8: Creating Question Wizard—Select Question Type

In this example, we will create a range question.

3. Select the Range radio button and click Next >.

Note: To return to the previous page in the wizard, click < Back.

Path: Creating Question

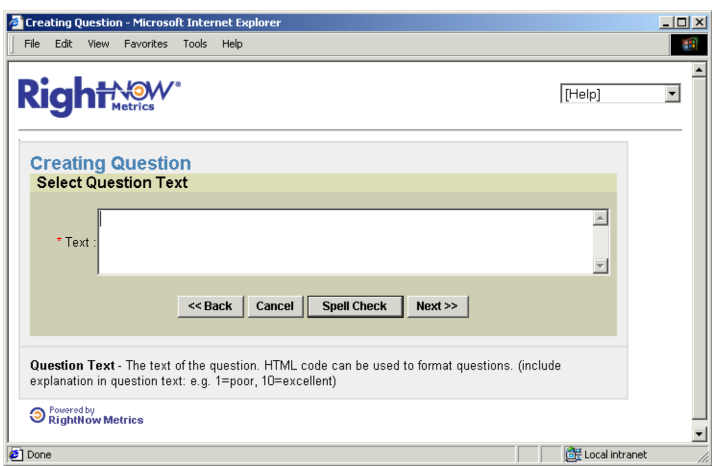


Figure 3-9: Creating Question Wizard—Compose your Question

4. Type the actual question text that will be displayed in the survey. For range questions, you should also include an explanation of the upper and lower range (for example, you could add the following: 1=poor, 5=excellent). For additional information about upper and lower range settings, refer to Chapter 5.

   Note: You can use HTML code in this field to format text and add graphics in surveys distributed by email link and email HTML and also check the spelling of your question using RightNow Metrics spell checker. RightNow Metrics is also configured so that participants in Web surveys can check the spelling of their short answer responses. For details about the spell check feature, refer to “Using Spell Check” on page 4-46.

5. Click Next >.

Path: Creating Question

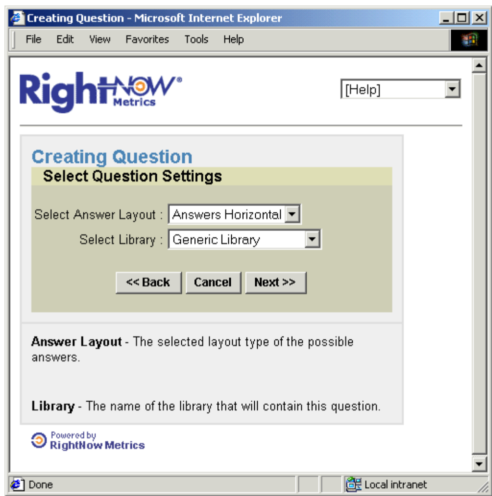


Figure 3-10: Creating Question Wizard—Select Answer Layout and Library

On this page of the wizard, you will select the layout of your answer choices (either a horizontal or vertical layout or a pull down menu list) and the library where you will store the question.

6. Select the answer layout.

   Note: For multiple choice and check all question types, you can format the answer choices in a table (either two or three columns). This can be effective for questions that contain a large number of answer choices.

7. Select the library you want to store the question in. The library feature in RightNow Metrics can help you organize your questions into categories and makes it easy to review the list of questions and add questions to a survey. Refer to Chapter 5 for information about creating question libraries.

8. Click Next >.

Path: Creating Question

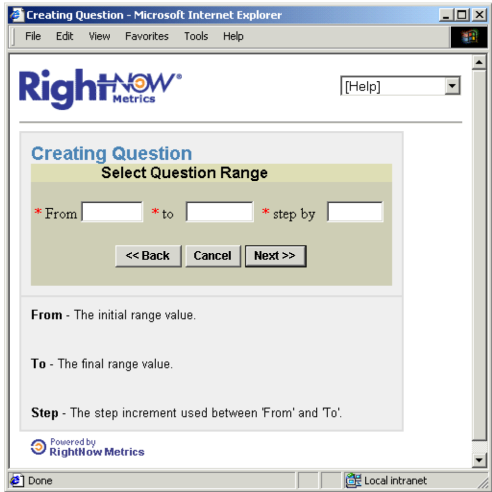


Figure 3-11: Creating Question Wizard—Select Question Range

You can now specify the range minimum, the range maximum, and the range step or increment. The range should be narrow enough so respondents can differentiate between a single point increment. For example, if you ask respondents to rate your staff using a range of 0=poor and 20=fantastic in increments of 1, they will not be able to differentiate between a rating of 17 and 18.

9. Type the range of the question and click Next >.

Path: Creating Question

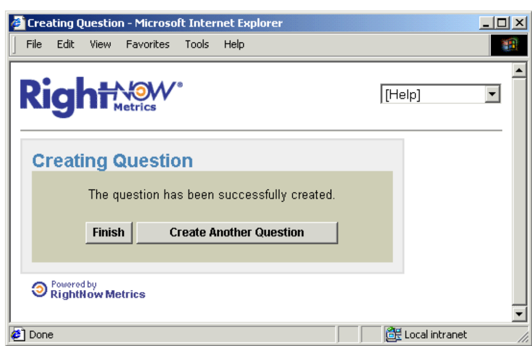


Figure 3-12: Creating Question Wizard—Completed

10. Your question has been saved. You can create another question or click Finish to return to the Survey Layout page.

Defining the Survey Layout

From the Survey Layout page you can continue creating your survey by adding questions, pages, and branches, if applicable.

Path: Creating Survey

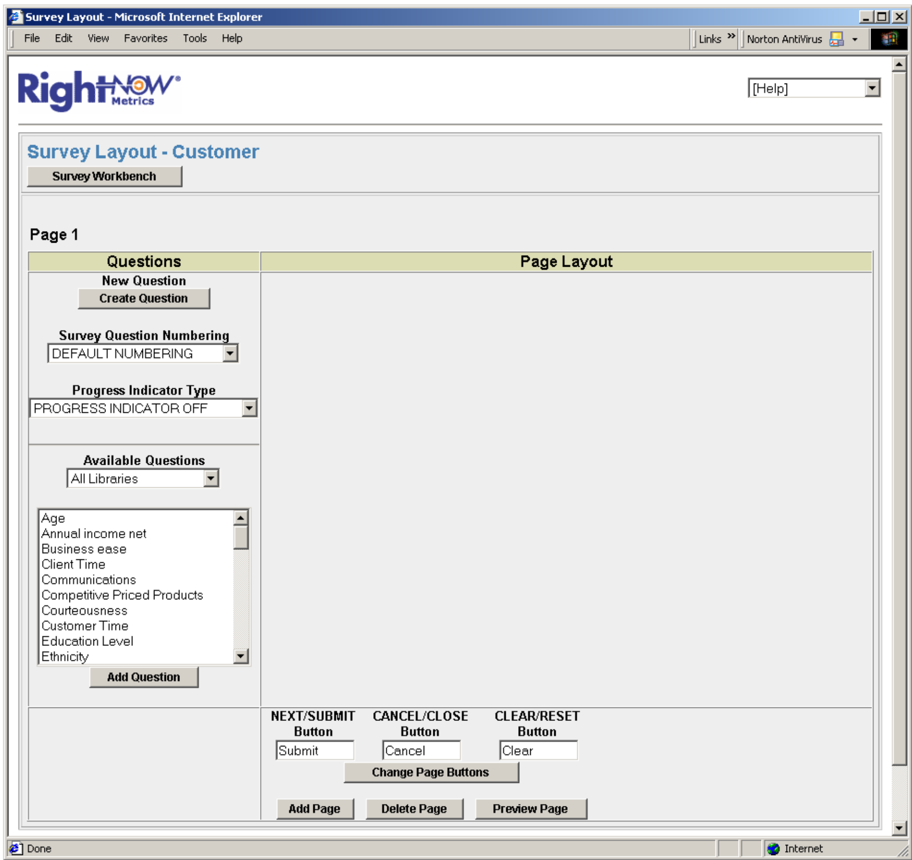


Figure 3-13: Survey Layout Page

In this part of the creating survey process, we will create a multiple-page survey. For specific instructions on creating all three survey layout types, refer to Chapter 4, “Survey Workbench.”

To create a multiple-page survey:

1. Select a question and click **Add Question**.
2. To view the questions in a specific library, click the Available Questions drop-down menu and select a library.

   Note: All actions you perform on the Survey Layout page are automatically saved. This allows you to navigate to another page within RightNow Metrics without needing to save your work; however, because this page does not have a cancel feature, be cautious as you make edits.

Path: Survey Layout> **Add Question**

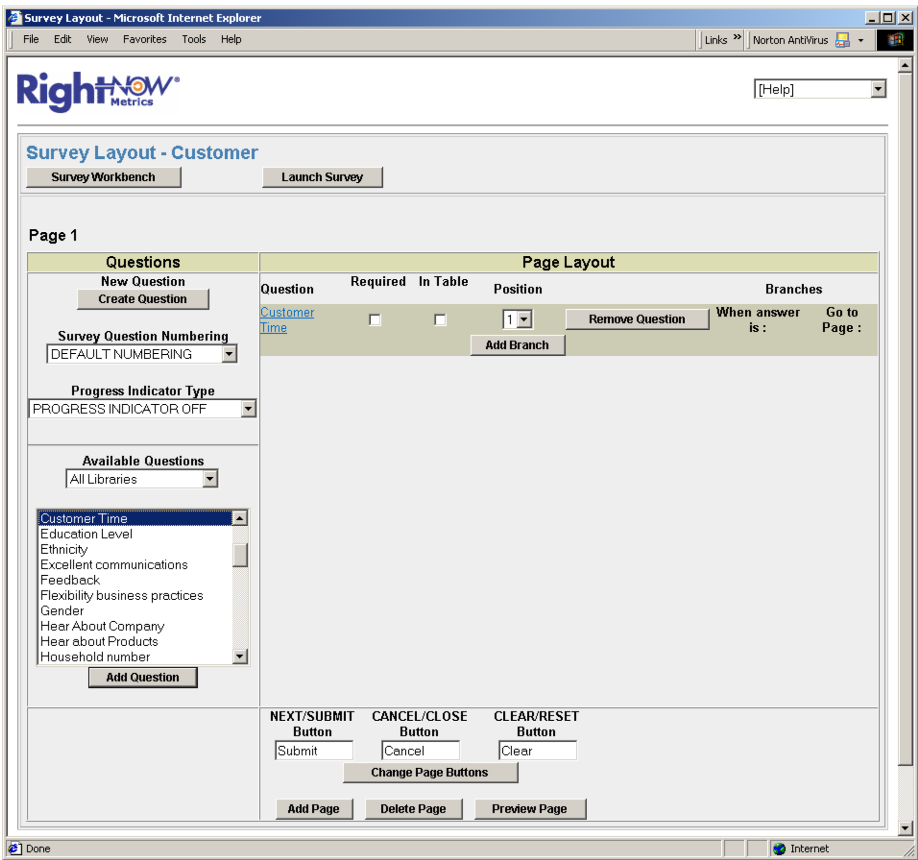


Figure 3-14: Survey Layout Page—Adding Questions

The question will then be displayed in the Page Layout panel; in addition, once you add a question to your survey, **Launch Survey** appears at the top of the page.

3. Add additional questions to page 1 of the survey. Remember that you can also create questions as you build your survey. This enables you to maintain a particular style or tone. To create a question, click **Create Question** to open the Creating Question wizard.

4. To change the relative position of a question, click the Position drop-down menu next to the desired question and select a new position. The positions of the other questions will automatically be reordered.

Note: If you were creating a single-page layout, you would add the necessary questions to page 1 and your layout would be complete. For a multiple-page survey, however, you will manually add as many pages as you need.

5. Click **Add Page**. The new page is placed after the last page in the survey.

Path: Survey Layout> **Add Page**

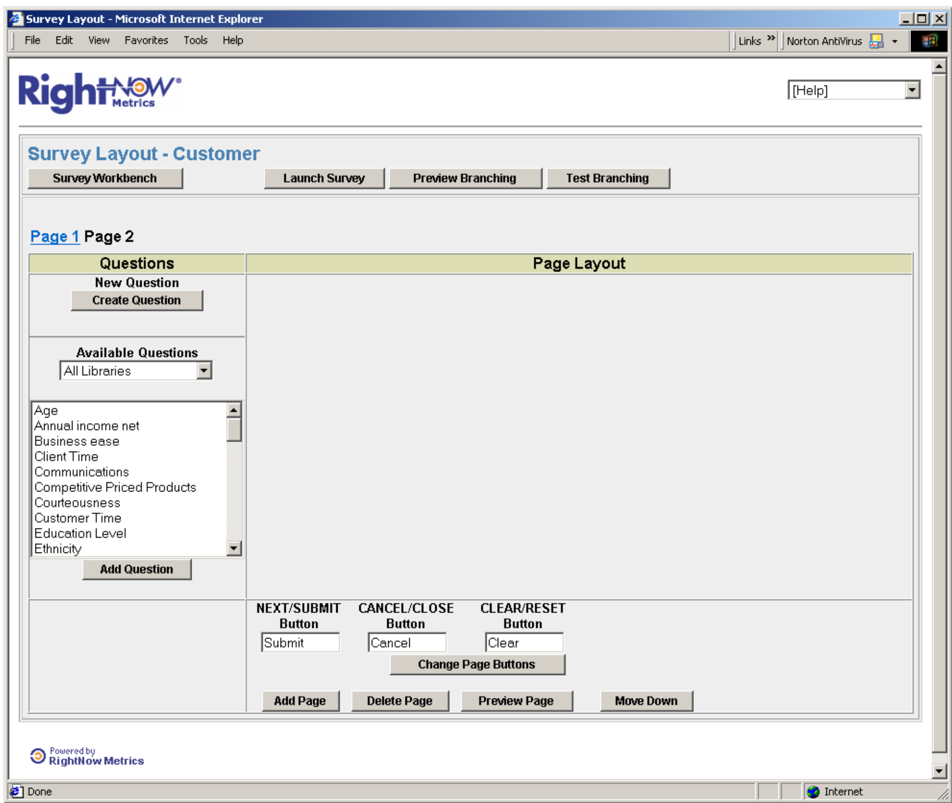


Figure 3-15: Survey Layout Page—Add Page

6. To add a question to page 2 of the survey, select the question in the Available Questions menu on page 2 and click **Add Question**. The question will then be displayed in the Page Layout panel indicating that it is now on page 2 of the survey.

7. To preview any page of the survey, click Preview Page to view the page from a separate Web browser.

8. Add any additional questions or pages.

This completes the procedure for creating a multiple-page survey layout. For more in-depth information about survey layout types and instructions for creating a branching survey layout, refer to Chapter 4, “Survey Workbench.”

Launching a Survey

Launching a survey is the last step in the creating survey process. When you launch a survey, you tell RightNow Metrics under what conditions to send the survey, when to send the survey, and what percentage of a population to survey. The Launching Survey wizard makes it easy to define the characteristics of your survey, and each page of the wizard contains a description of the options available.

Before you launch your survey, you must identify certain elements you will need for defining survey characteristics. For example, for surveys sent as email, you must establish an email mailbox to receive survey results; you must also decide on any text or graphics you want displayed on the top and bottom of surveys distributed as email links. For a complete list of the information you need to launch a survey and instructions for launching both Closed-Incident and On-Demand surveys, refer to “Launching a Survey” on page 4-28.

To launch a survey:

1. Click **Launch Survey** on the Survey Layout page.

Path: Survey Layout> **Launch Survey**

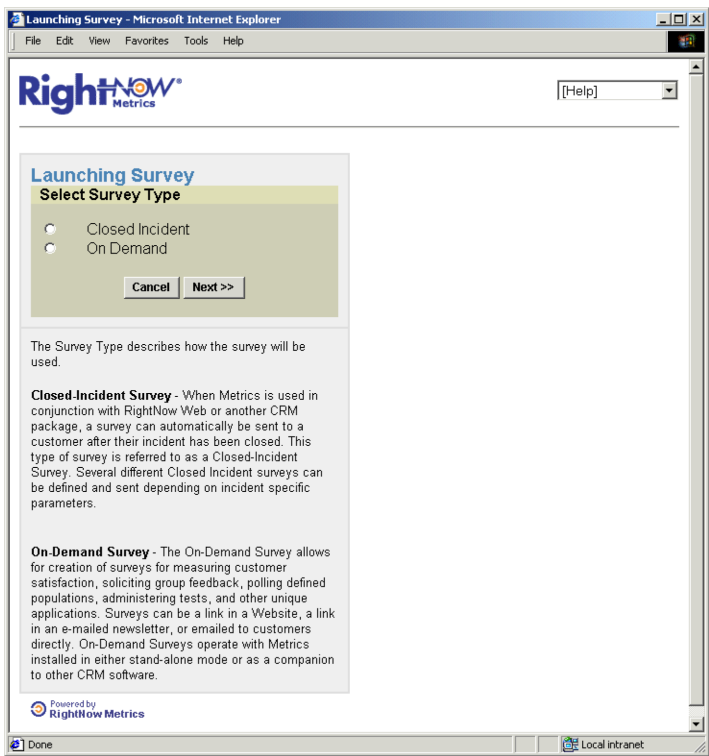


Figure 3-16: Launching Survey Wizard—Select Survey Type

As described at the beginning of this chapter, when RightNow Metrics is integrated with RightNow eService Center or another customer relationship management package, you can send Closed-Incident surveys to customers after their incidents have been closed. After launching a Closed-Incident survey, you can also define rules to trigger the survey in specific incidents. (For information on defining sending rules, refer to Chapter 6.)

You can also launch On-Demand surveys to target a specific audience regarding any topic such as product satisfaction or purchasing habits. This survey is triggered when you launch it, but can be scheduled to send at a later date. You can also use this survey type to create a Web page for your survey.

2. Select the type of survey and click Next >. In this sample, we will create a Closed-Incident survey.

Note: To cancel at any time and return to the Survey Layout page, click Cancel. To return to the previous page, click < Back.

Path: Launch Survey

Figure 3-17: Launching Survey Wizard—Select Survey Distribution

3. Select the distribution method for your survey. Refer to “Determine the Distribution Method” on page 3-5 for a discussion of methods and samples.

4. Click Next >.

Path: Launch Survey

Figure 3-18: Launching Survey Wizard—Select Survey Settings

Survey settings identify when your survey will be sent, what percentage of the specified population will be sent surveys, survey status, and what respondents will see when they complete their surveys. You can show respondents survey results, present a link to the results, or display a thank you page.

5. Select the survey settings and click Next >. For a description of each field on this page, see Table 4-6, “Select Survey Settings Field Descriptions,” on page 4-32. Survey settings differ slightly for On-Demand surveys.

Path: Launch Survey

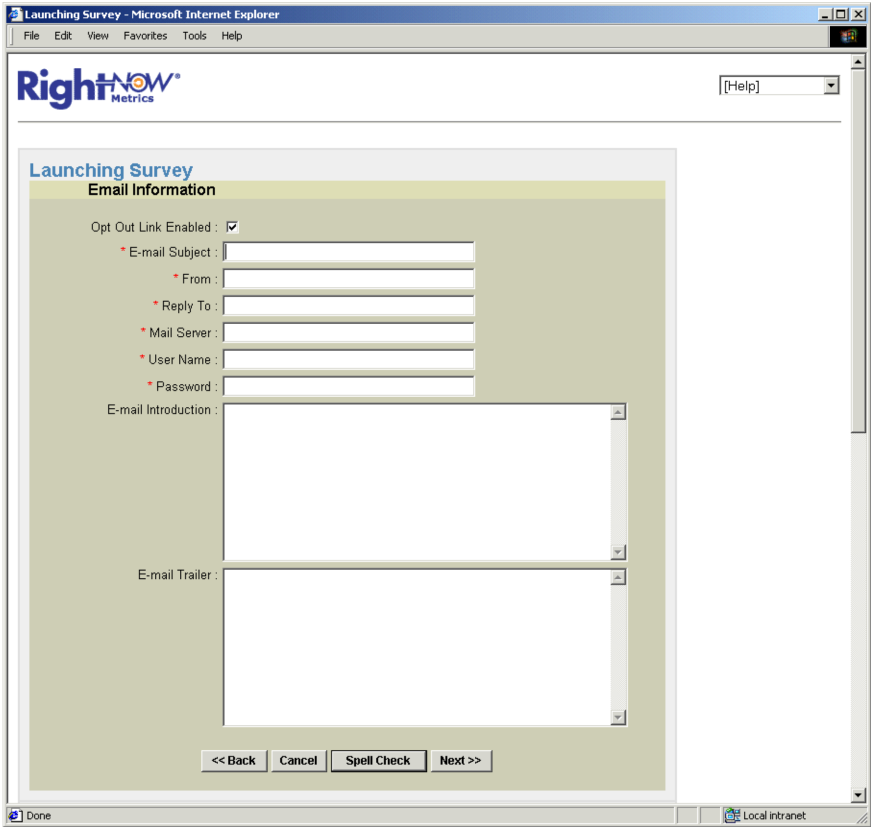


Figure 3-19: Email Information Page—Closed-Incident Survey

On this page of the wizard, you define email information, including subject line, from and reply to addresses, mail server, and email introduction and trailer. You can also allow survey participants to remove their email address from receiving future surveys by checking the Opt Out Link Enabled check box.

6. Enter the necessary information on the Email Information page. Fields marked with an asterisk are required fields. For a description of each field on this page, see Table 4-7, “Email Information Page Field Descriptions,” on page 4-34.

7. Click Next > and Finish to launch the survey.

This completes the process of creating a survey in RightNow Metrics using the Creating Survey wizard as your starting point. The remaining chapters in this manual contain an in-depth look at all of the components of RightNow Metrics and how they can be used to implement your specific survey strategy.

Survey Workbench

The Survey Workbench is the main location for working with surveys that have not been launched. From the Survey Workbench, you can create the layout for a survey, including adding questions, pages, and branches.

Once you complete your survey layout and are ready to send it, you will launch your survey from the Survey Workbench using the Launching Survey wizard. Through a series of basic questions, the wizard assists you in defining survey settings, including what type of survey you want to send, how you want to send the survey, and when to send the survey.

Although you can modify certain characteristics of launched surveys from the Survey Workbench, think of the Survey Workbench as the location for working on surveys that have *not* been launched. (Likewise, the Active Surveys console is where you will maintain surveys after they have been launched, including setting up scoring rules, entering survey results, and sending additional surveys. The Active Surveys console is also your starting point after you log in to RightNow Metrics. Refer to Chapter 6, “Active Surveys.”)

New

A powerful new feature in RightNow Metrics alerts you when there is a problem with any network, server, mailbox, or password settings when launching your surveys. Once you create an email notification, RightNow Metrics will send you an email alert when there is a communication problem and will include a description of the problem. Refer to “Launching a Survey” on page 4-28 for more information about this feature.

This chapter contains the procedures necessary to prepare surveys to be sent to your customers and potential customers. It is divided into the two main tasks you will perform from the Survey Workbench:

1. Adding questions, pages, and branches to a survey (see “Creating a Survey Layout” on page 4-8).
2. Defining the survey characteristics necessary to send the survey to customers and potential customers (see “Launching a Survey” on page 4-28).

Within the main sections are specific procedures for creating each layout type and launching both Closed-Incident and On-Demand surveys. Also included in this chapter are procedures for editing and previewing a survey layout and copying and deleting surveys.

Key Terms

Refer to the following key terms as you create survey layouts and launch surveys.

Anonymous tracking—An option in an On-Demand survey distributed as an email link or an email HTML. In Anonymous tracking, the email addresses of the respondents are not necessary for them to respond to the survey; therefore, the list of respondents' email addresses is not stored in the database.

Branching layout—A layout type that directs the flow of questions based on the responses chosen by survey participants. Incorporating Web-based tree logic, this layout type enables branches and pages to be created that include more than one line or branch of questions. Branches can be created for range and multiple choice questions.

Closed-Incident survey—A survey that is automatically emailed to customers after the questions they submit have been answered and their incidents have been solved by a customer service representative. Closed-Incident surveys can be used when RightNow Metrics is integrated with RightNow eService Center or another customer relationship management package. This type of survey provides automatic customer feedback and then instantly tabulates and displays the results. Several different Closed-Incident surveys can be defined and sent depending on incident-specific parameters.

Email—A method for distributing surveys. Surveys distributed as email are sent to participants as plain text through email. Respondents do not need a Web browser to answer email surveys; they simply reply to the email by entering the number of their choice or short answer in the space below the question and options.

Email HTML—A method for distributing surveys in an email that contains either an ASCII text URL for the survey or a Web version of the survey. If the customer's email client is capable of displaying HTML, the customer will see the survey. If the customer's email client does not support this functionality, the customer will see the ASCII text URL.

Email Link—A method for distributing surveys in which surveys are displayed on a Web page. Links to surveys can be sent in email, placed on a Web page, and built into a hyperlink for accessing a Web page.

Launching a survey—The process of defining the characteristics of a survey, including the type of survey, how the survey will be sent (what method of distribution), and when it will be sent.

Launching Survey wizard—An interactive process for launching a survey, including defining survey settings, choosing the distribution method, and choosing when the survey will be sent.

Multiple-page layout—A layout type that contains more than one page. Multiple-page surveys contain one line of questions and can be effective in breaking up large surveys into manageable groups.

On-Demand survey—A survey for measuring customer satisfaction, opinions, product intelligence, or any other area of interest. On-demand surveys can be created for RightNow Metrics installed in either standalone mode or as an add-on module to RightNow eService Center. On-demand surveys can be part of a Web site or emailed to customers.

Single-page layout—A layout type for surveys distributed by email in which all questions are on one page.

Targeted tracking—An option in an On-Demand survey distributed as an email link or email HTML. In targeted tracking, only those persons who were specifically sent the survey are allowed to respond. The email addresses are placed in the database, and a list of the email addresses for those who responded to the survey can be viewed.

Trigger email—An email that is automatically sent to a customer whose incident has been closed (solved) by a customer service representative. The trigger email can contain the survey or a link to a Web-based survey.

Navigating the Survey Workbench

Click **Survey Workbench** after logging in to RightNow Metrics. (You can also access the Survey Workbench from most pages in RightNow Metrics.)

Path: **Survey Workbench**

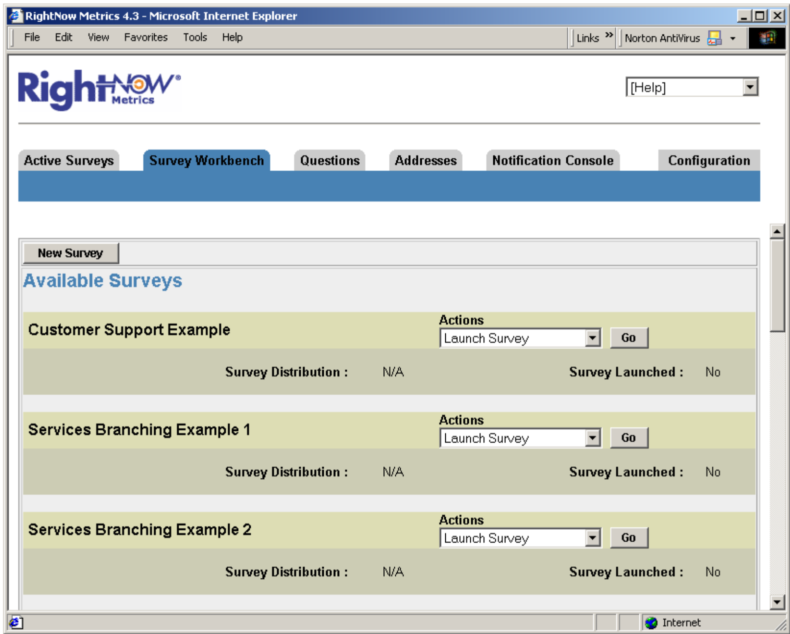


Figure 4-1: Survey Workbench

Survey Workbench when Integrated with RightNow eService Center

If your RightNow Metrics 4.3 application is integrated with RightNow eService Center 5.5.1 or higher, the Survey Workbench contains an Assigned To drop-down menu where you can assign surveys to other staff members. Figure 4-2 shows the Assigned To drop-down menu on the Survey Workbench.

Path: Survey Workbench ***when integrated with RightNow eService Center***

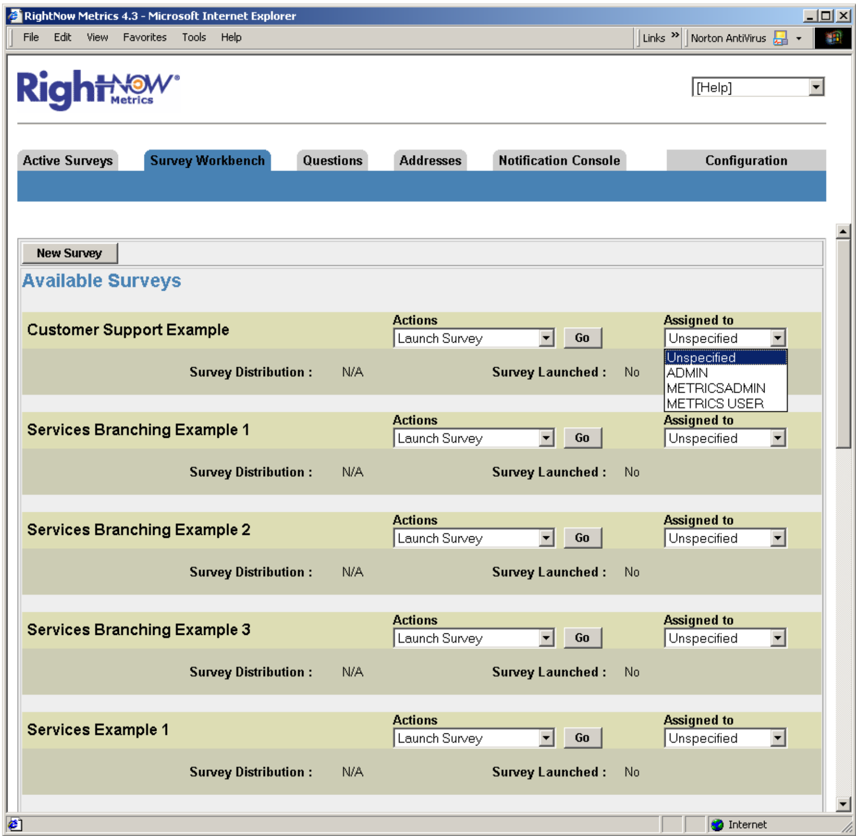


Figure 4-2: Survey Workbench when Integrated with eService Center

As a user with full administration privileges set in your profile, you can assign surveys to other staff members, regardless of which staff member created them. For information about integrating RightNow Metrics 4.3 with eService Center, refer to Chapter 10, “Integration,” or contact your RightNow Technologies customer support representative.

The Survey Workbench displays a list of all surveys that have been created in your RightNow Metrics database (listed under Available Surveys). Launch status and distribution method are also listed. You can modify surveys that have not been launched as well as modify certain elements in surveys that have already been launched.

Note: In addition to working with existing surveys from the Survey Workbench, you can also invoke the Creating Survey wizard to create a new survey. See Chapter 3 for information about this and other RightNow Metrics wizards.

You can take the following actions on surveys that have not been launched:

- Add and remove questions
- Create and modify the layout of a survey, including adding pages and branches
- Copy and delete surveys
- Launch surveys

You can take the following actions on surveys that have already been launched:

- Send surveys to additional email addresses
- Manually enter survey results for anonymous surveys
- Assign a scoring system to each question

For instructions on modifying a survey after it has been launched, see Chapter 6.

Table 4-1 describes the buttons and fields on the Survey Workbench.

Table 4-1: Survey Workbench Field Descriptions

Field/Button	Description
New Survey	Click this button to launch the Creating Survey wizard.
Available Surveys	This column displays the surveys in the database.
Actions Launch Survey	Click this drop-down menu to select an action: • For surveys that have not been launched, your options include Launch Survey, Preview, Add/Remove Questions, Copy, and Delete. • For surveys that have already been launched, your options include Preview, Change Settings, Copy, Send More, Scoring, and Delete.
Go	Click this button to perform the action selected in the Actions drop-down menu.
Assigned to Unspecified	Click this drop-down menu to assign the survey to another staff member. **Note:** This menu appears on the Survey Workbench only when RightNow Metrics is integrated with RightNow eService Center.
Survey Distribution	This field shows the method of distribution: Email Link, Email HTML, Email, or N/A (survey has not been launched).
Survey Launched	This field specifies whether the survey has been launched.
[Help]	Click the Help drop-down menu to select one of the following: Help On This Page, Help Contents, About Metrics, or Other Resources.

The next section contains procedures for creating all three layout types:

- "Creating a Single-Page Layout" on page 4-10.
- "Creating a Multiple-Page Layout" on page 4-14.
- "Creating a Branching Layout" on page 4-17.

Note: Make sure you have chosen a distribution method before laying out your survey. Refer to "Determine the Distribution Method" on page 3-5.

Creating a Survey Layout

Changed

On the Survey Workbench, select Add/Remove Questions from the Actions drop-down menu next to the appropriate survey and click Go. This opens the Survey Layout page where you will add questions, pages, and branches, or modify a predefined survey. (You will also access the Survey Layout page when you add questions to a survey using the Creating Survey wizard.)

Path: Survey Workbench>Add/Remove Questions> Go

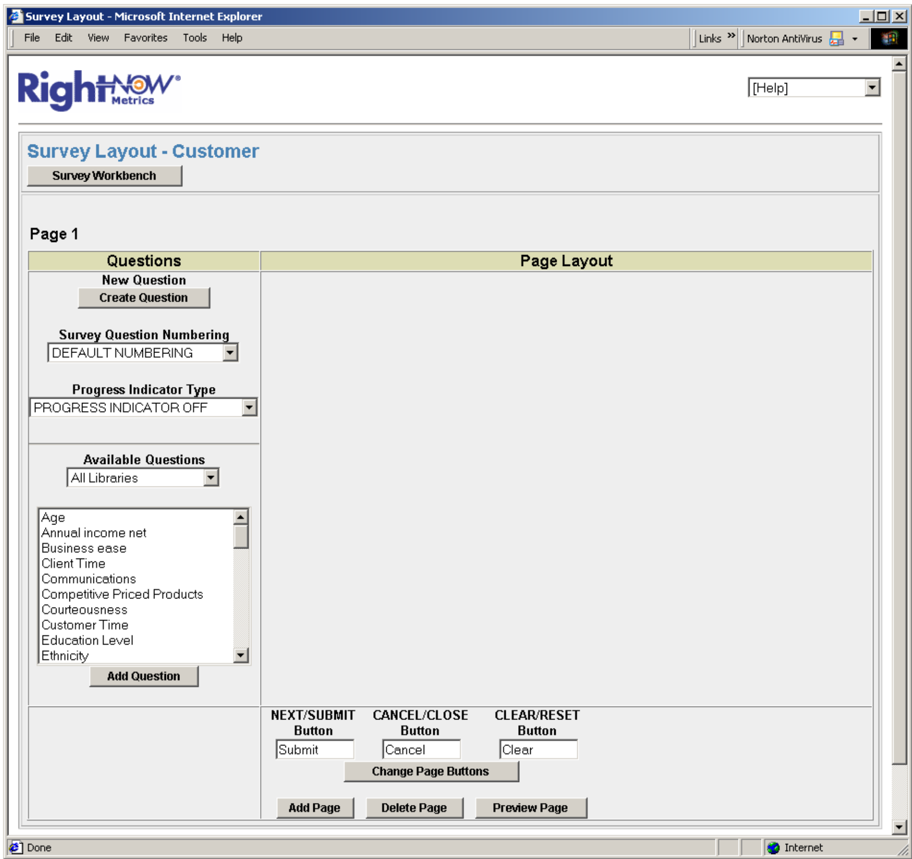


Figure 4-3: Survey Layout Page

Note: Figure 4-3 shows the Survey Layout page before any questions have been added to the survey.

Table 4-2 table describes the fields and buttons on the Survey Layout page.

Table 4-2: Survey Layout Page Field Descriptions

Field/Button	Description	
Survey Workbench	Click this button to close the Survey Layout page and return to the Survey Workbench.	
Page 1	This heading shows that you are currently viewing and working on page 1 of the survey. If the text is blue and underlined, click the link to scroll the screen to this page.	
Questions	This column lists the options available as you add questions to your survey.	
Create Question	Click this button to open the Creating Question wizard and create a new question. For specific instructions, refer to Chapter 5.	
Survey Question Numbering DEFAULT NUMBERING	Click this drop-down menu to select the numbering scheme for the questions in the survey. Options include Default Numbering, Continuous Numbering, or No Numbers.	New
Progress Indicator Type PROGRESS INDICATOR OFF	Click this drop-down menu to enable or change the survey progress indicator. If enabled, the progress indicator will display on the actual survey and track the participant's progress in completing the survey. Options in the drop-down menu include Progress Indicator Off (the default), Progress Bar Indicator, or Progress Number Indicator (displayed as a percentage).	New
All Libraries	Click this drop-down menu to select a library. The available questions list box will display only those questions contained in the selected library.	
Available Questions List	Select a question in this list box to add to the survey. This list box contains all of the questions in the library specified in the Available Questions drop-down menu.	
Add Question	Click this button to add the selected question to the Page Layout panel.	
Page Layout	Once you add questions to a survey, this panel displays the questions and includes the display position of each question. It also displays any branches that have been created and the routing associated with each answer choice. Within this panel, you can edit a question, remove a question from the page, add / remove a branch, and specify branch routing. Refer to Figure 4-5, "Survey Layout Page—Add Selected Question," on page 4-12 to see the additional fields and buttons in this panel once you add a question.	

Table 4-2: Survey Layout Page Field Descriptions (Continued)

Field/Button	Description
NEXT/SUBMIT Button Submit	This field shows the default button text to submit the survey or move to the next page of the survey. New
CANCEL/CLOSE Button Cancel	This field shows the default button text to cancel or close the survey. New
CLEAR/RESET Button Clear	This field shows the default button text to clear an entry in a survey. New
Change Page Buttons	After changing the text on the Submit, Cancel, or Clear button that appears on surveys, click this button to have your change take effect for the current page. New
Add Page	Click this button to add a page to the survey. Pages can be used in conjunction with branches to control the flow of the survey. Each additional page is added as the last page of the survey.
Delete Page	Click this button to delete a page from the survey. If you delete a page that is used in a branch, the Go to Page field for that branch will be reset to point to the page following the page that was deleted.
Preview Page	Click this button to open a Web browser and preview the page.

Creating a Single-Page Layout

Surveys distributed by email and email HTML can contain only a single page. All questions will be on one page when using this format.

To create a single-page survey layout:

1. On the Survey Workbench, select Add/Remove Questions from the Actions drop-down menu next to the appropriate survey and click Go.

Path: Survey Workbench>Add/Remove Questions> Go

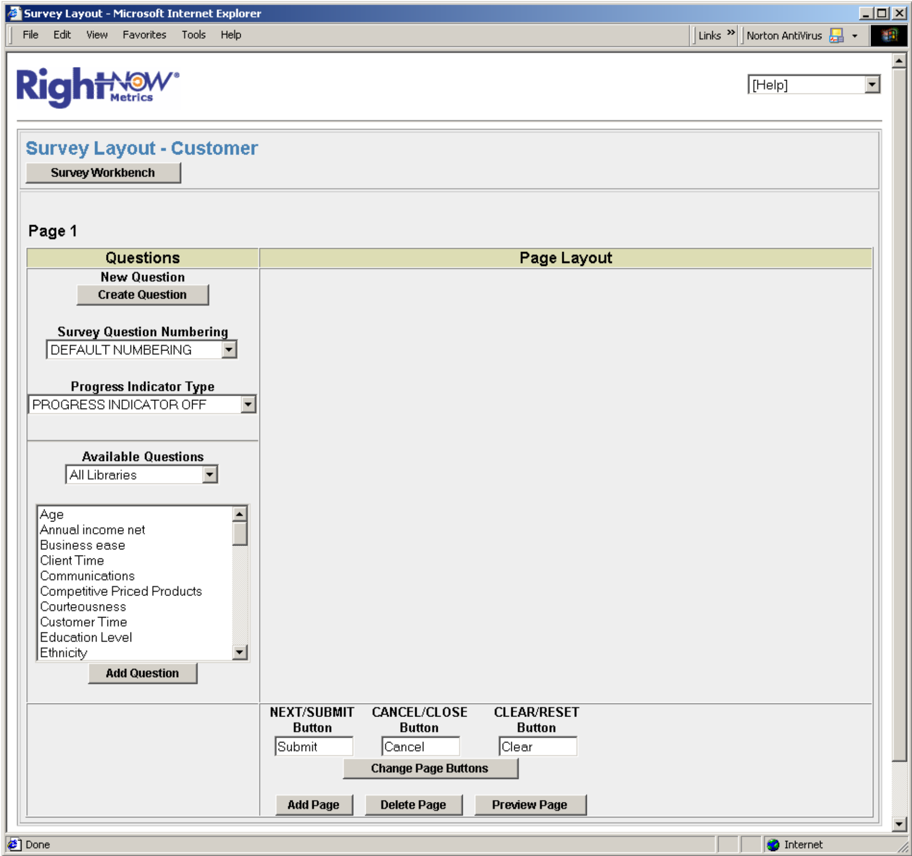


Figure 4-4: Survey Layout Page

Note: All actions you perform on the Survey Layout page are automatically saved. This allows you to navigate to another page within RightNow Metrics without needing to save your work; however, because this page does not have a cancel feature, be cautious as you make edits.

2. To select a library containing your question, click the Available Questions drop-down menu. For information about creating and storing questions in libraries, refer to Chapter 5.

3. Select a question from the list box and click Add Question. The question will be displayed in the Page Layout panel.

Path: Survey Workbench>Add/Remove Questions> Add Question

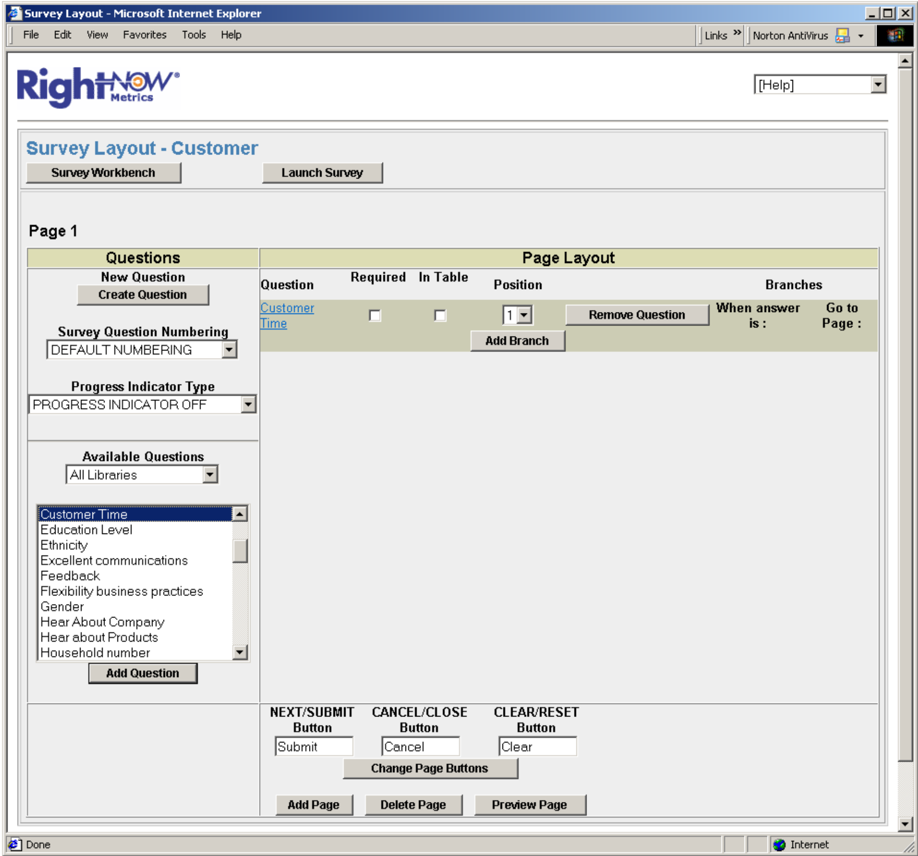


Figure 4-5: Survey Layout Page—Add Selected Question

Note: Once you add a question, additional fields and buttons appear on the Survey Layout page, including the Launch Survey button at the top of the page. See Table 4-3 for descriptions of the added fields and buttons.

Table 4-3: Survey Layout Page after Adding a Question

Field/Button	Description
Question Link	Click the question name to open the Editing Question page. **Note:** Editing a question will change all instances of the question, not just the question in the survey you are working on.
Required	Select this check box to require the participant to answer the question. **Note:** Participants cannot submit their survey without answering required questions.

Table 4-3: Survey Layout Page after Adding a Question (Continued)

Field/Button	Description
In Table ☑	Select this check box to place the answer choices in a table.For an example of a multiple choice question in table format, see Chapter 5.
Position 1 ▾	Click this drop-down menu to change the position of a question on the page. Each question you add is automatically placed after the last question.
Branches	This section of the Page Layout panel contains the fields and options available for adding a branch to a survey question. The When Answer Is and Go to Page drop-down menus will be available after you add a branch. See the description of these drop-down menus in Table 4-4, "Survey Layout Page after Adding a Branch," on page 4-18.
Remove Question	Click this button to remove a question from a page.
Add Branch	Click this button to add a branch in the line of questions. A branch can be used to take the participant to another page of questions depending on their answer choice. For more information on the tree logic feature, refer to "Creating a Branching Layout" on page 4-17. **Note:** You can add branches to range and multiple choice questions only.
Launch Survey	Click this button to launch the survey. **Note:** This button will not appear until you add a question to the survey.Notice in Figure 4-4, "Survey Layout Page," on page 4-11 that the button is not present because no questions have been added.

4. Add additional questions as necessary.

Note: You can also create questions from the Survey Layout page as you build your survey. This enables you to maintain a particular style or tone. Click Create Question to open the Creating Question wizard. For information on the Creating Question wizard and creating questions, refer to Chapter 5.

5. To change the relative position of a question, click the Position drop-down menu next to the desired question and select a new position. The position of following questions will automatically be reordered.

6. To view the single-page survey from a separate Web browser, click Preview Page.

7. When you finish adding or creating questions for the single-page survey, click Survey Workbench to return to the Survey Workbench, or click Launch Survey to launch your survey. Refer to "Launching a Survey" on page 4-28 for instructions.

Creating a Multiple-Page Layout

A multiple-page survey layout can be used only with surveys distributed by email link. Each survey page is displayed as a separate Web page with Submit after the last question on the page. When participants click Submit, their responses are sent to the database and the next page is displayed.

New

Note: You can change the text on the Submit button or any button that appears on the survey on a per-page basis. Refer to Table 4-2, "Survey Layout Page Field Descriptions," on page 4-9 for a description of this feature, or see step 4 on page 4-15 for specific instructions.

To create a multiple-page survey layout:

1. Add questions to your survey in the same manner as you did in creating a single-page survey layout (see "To create a single-page survey layout:" on page 4-10).

Path: Survey Workbench>Add/Remove Questions> Go > Add Question

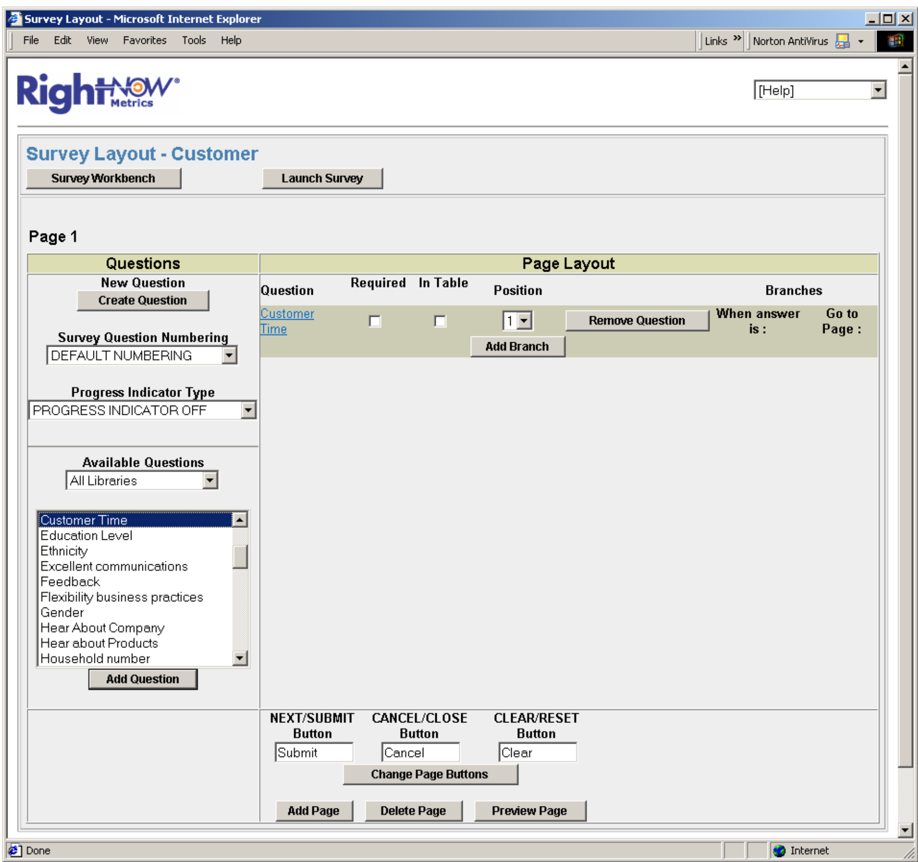


Figure 4-6: Survey Layout Page—Add Selected Question

2. Click **Add Page** to add an additional page to the survey. The new page is placed after the last page in the survey.

Path: Survey Workbench>Add/Remove Questions> **Add Page**

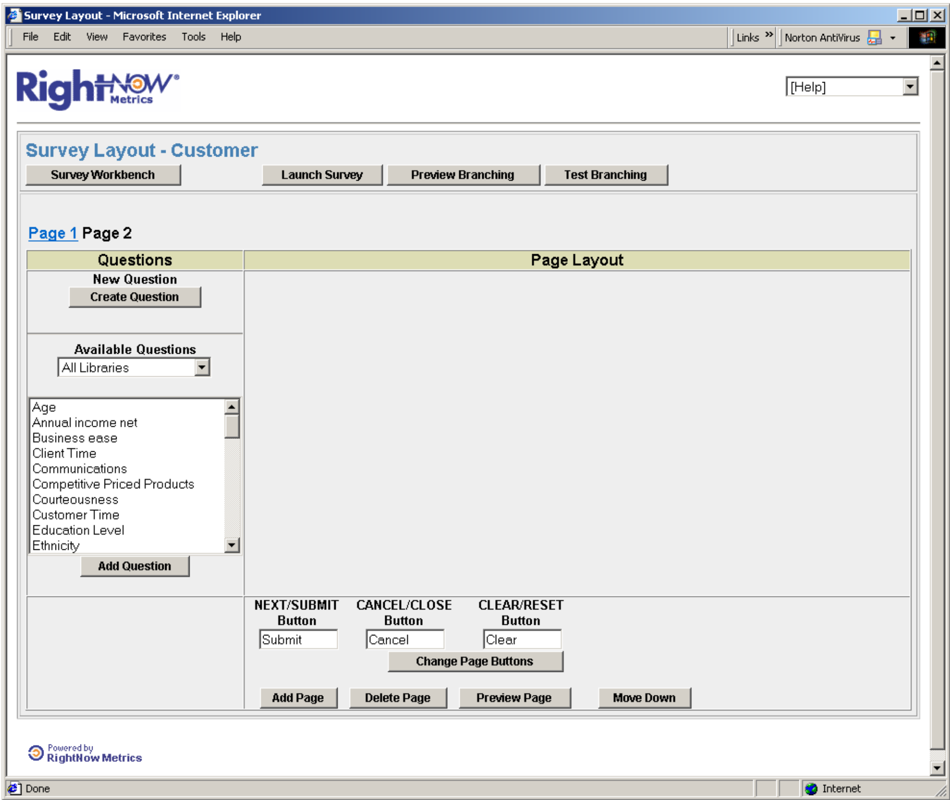


Figure 4-7: Survey Layout Page—Add Page

Note: The **Move Down** button appears once you add a page to your survey. You can click this button to reorder the pages in your survey.

New

3. To add a question to page 2, select the question in the Available Questions list on page 2, and click **Add Question**. The question will be displayed in the Page Layout panel indicating that it is on page 2 of the survey.

4. To change the text on any of the buttons that will appear on the survey, select the text, make the change, and click **Change Page Buttons**.

New

5. To preview a page, click **Preview Page** to view the page from a separate Web browser.

6. When you finish adding questions and pages to the multiple-page survey, click **Survey Workbench** to return to the Survey Workbench, or click **Launch Survey** to launch your survey. Refer to “Launching a Survey” on page 4-28 for instructions.

Creating a Branching Layout

The branching survey layout is available only for surveys distributed by email link. Branches direct the flow of questions based on the responses the participant chooses. Each branch links to a page in the survey layout based on a specific answer choice. Multiple branches can be added to one question, with each branch based on a separate answer choice.

Note: Branches can be added on multiple choice and range questions only.

To create a branching survey layout:

1. Add questions to your survey in the same manner as you did in creating a single-page survey layout (see "To create a single-page survey layout:" on page 4-10). Follow step 1 through step 4.

2. Click **Add Branch** next to the question you want to add a branch to.

Path: Survey Workbench>Add/Remove Questions> **Add Branch**

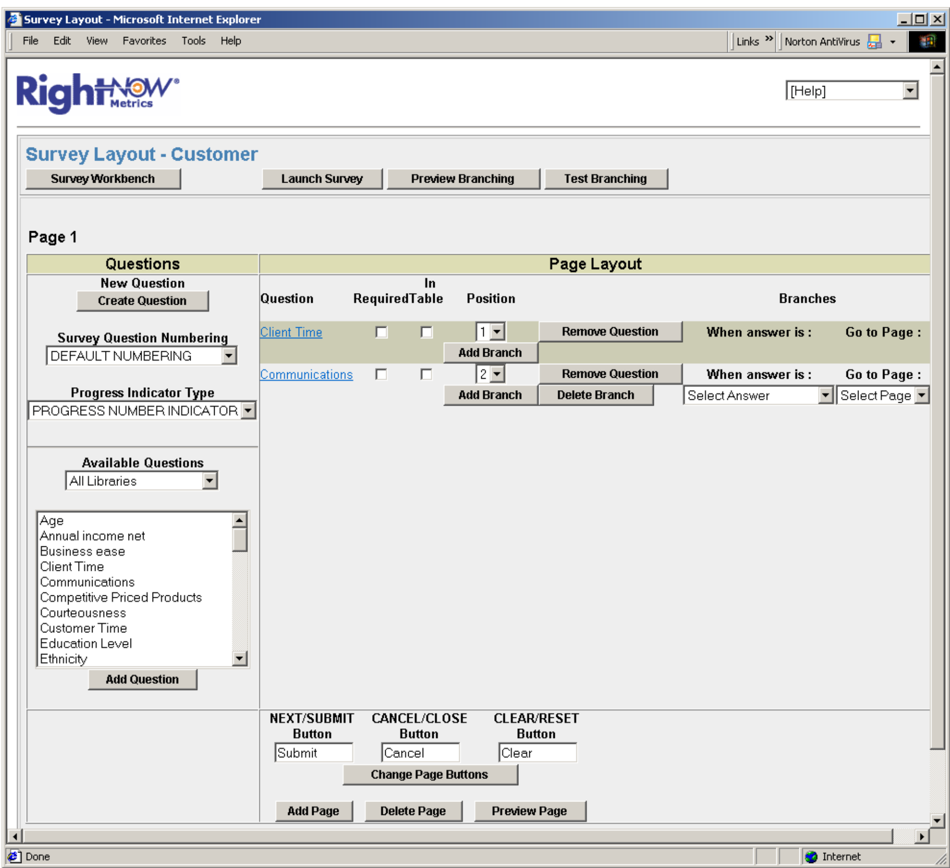


Figure 4-8: Survey Layout Page—Adding a Branch

Note: Additional fields and buttons appear after you add a branch. Refer to Table 4-4 for a description of the fields and buttons available after adding a branch to the survey.

Table 4-4: Survey Layout Page after Adding a Branch

New

Field/Button	Description
Delete Branch	Click this button to delete a branch.
When answer is : Select Answer	Click this drop-down menu to select an answer choice for the branch. When participants choose this answer choice, they will be taken to the page specified in the Go to Page drop-down menu. This drop-down menu is populated with the answer choices specified in the question.
Go to Page : Select Page	Click this drop-down menu to select the page that will be displayed when the participant chooses the answer choice specified in the When Answer Is drop-down menu. This drop-down menu lists each page in the survey plus End, which takes the participant to the end of the survey.
Preview Branching	Click this button to preview your branching.
Test Branching	Click this button to test your branches.

At this point, you will specify which answer choice triggers the branch and where the branch will go. In most cases, the next step is to create a page that contains the questions for the new branch and a page that continues the main line of questions.

3. Click Add Page to add an additional page for the branch. The new page will be placed at the end of the survey. Remember that clicking Add Page from any page in the survey will always add a page at the end of the survey.

Path: Survey Workbench>Add/Remove Questions> Add Page

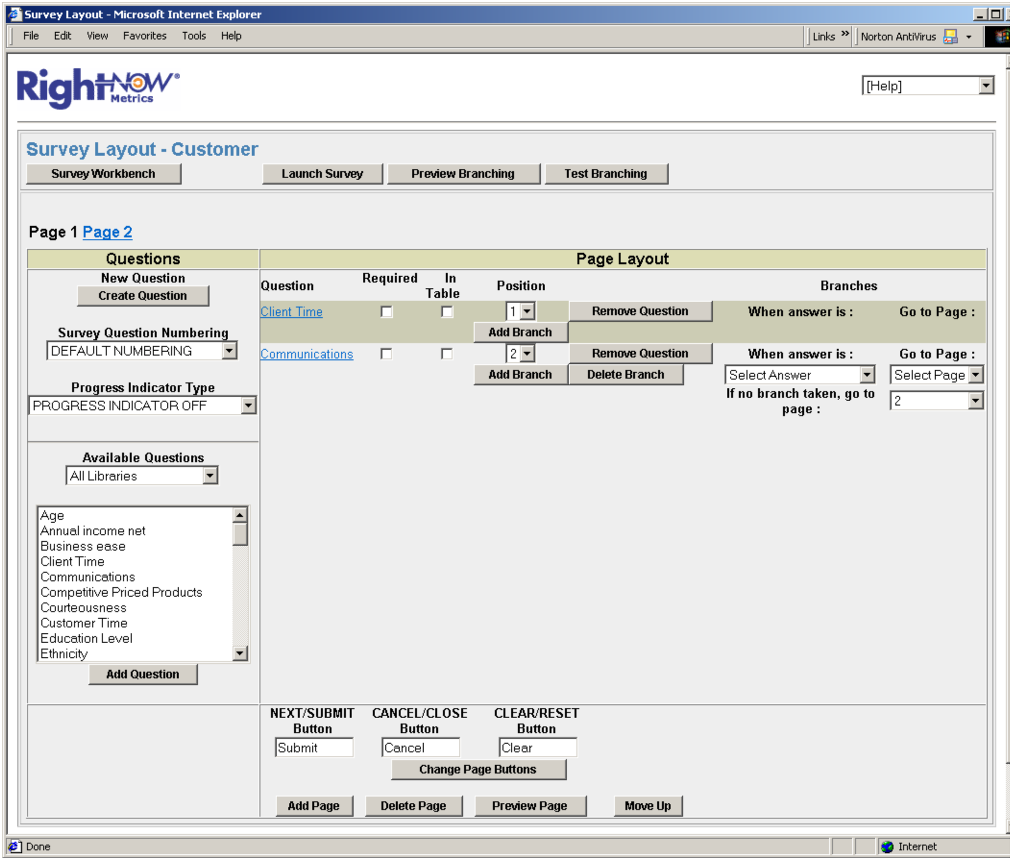


Figure 4-9: Adding a Page for the Branch

Having added a branch on the first page and a page to the end of the survey, another field is displayed on the first page called If No Branch Is Taken, Go To Page drop-down menu. This is where you specify the page that will be displayed if the participant does not take the branch.

In addition, the Move Up button now appears. You can click this button to change the order of the pages in your survey. For example, if you are on page 1 of the survey and click Move Up, the questions on page 1 move to page 2; any questions on page 2 move to page 1. Likewise, clicking Move Down on page 2 would change the order of pages 1 and 2.

New

Note: If you move a page in a branching layout, you will have to adjust the branching (go to page) after you move the page.

4. Click Add Page to add an additional page to the survey to continue the main line of questions.

Path: Survey Workbench>Add/Remove Questions> Add Page

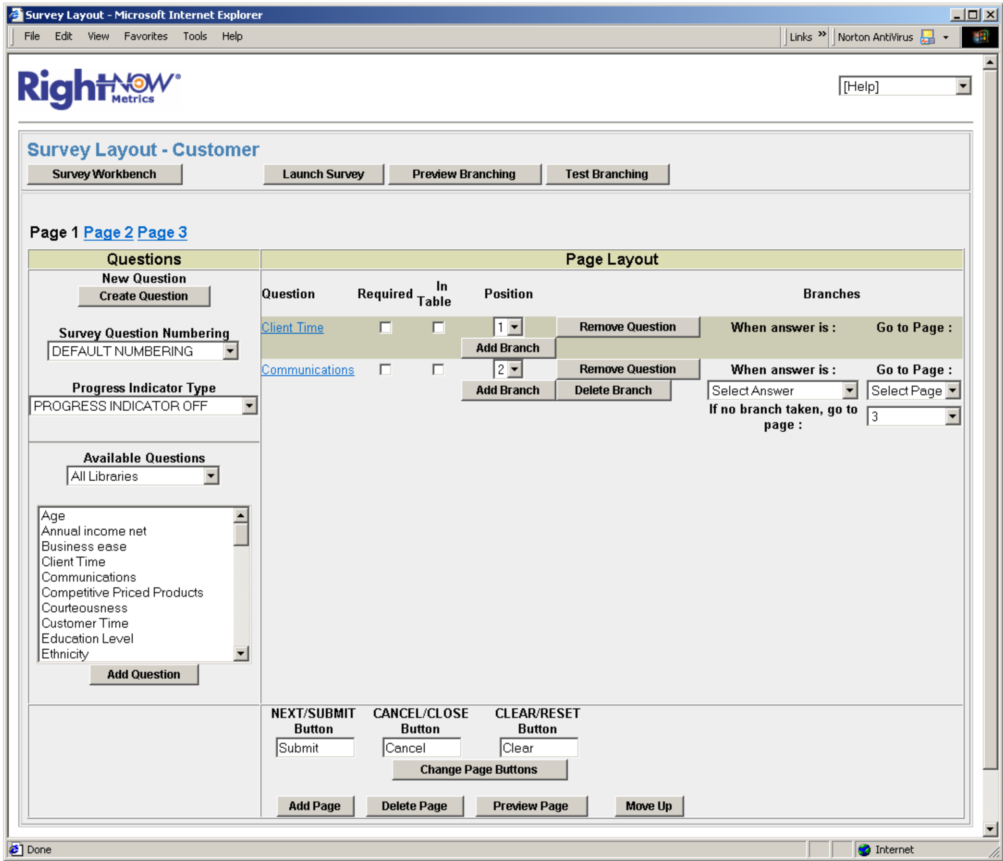


Figure 4-10: Adding a Page for the Main Line of Questions

As shown in Figure 4-10, we have added pages 2 and 3. Page 2 will contain the branch questions and page 3 will continue the main line of questions. You can now set the values in the branch drop-down menus on page 1.

5. Click the When Answer Is drop-down menu to select the answer choice that will trigger the branch (in Figure 4-11, an answer choice of “Very Unsatisfied” triggers the branch).
6. Click the Go to Page drop-down menu to select the target page for the branch (page 2 in our example).
7. Click the If No Branch Is Taken, Go To drop-down menu to select a target page if the participant does not take a branch on this page (page 3).

Path: Survey Workbench>Add/Remove Questions

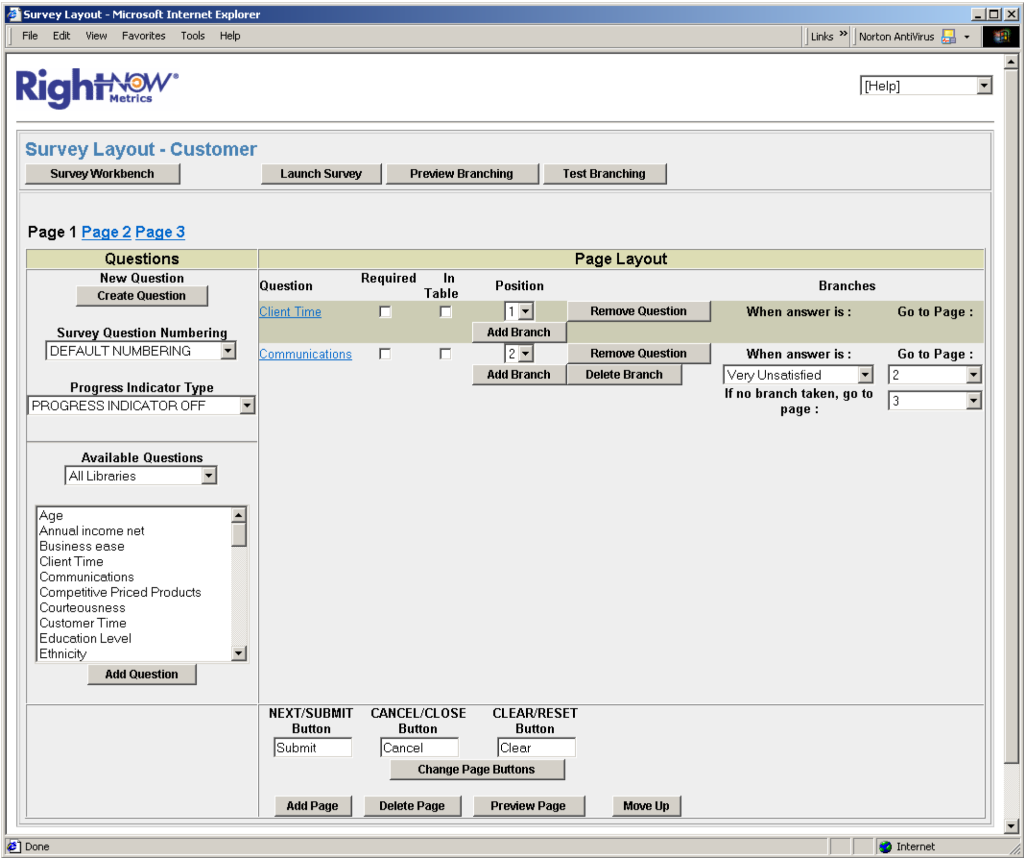


Figure 4-11: Survey Layout Page—Branch Configuration

If participants take the branch, page 2 will be displayed. If they do not take the branch (that is, if they answer other than "Very Unsatisfied"), page 3 will be displayed—the main line of questions. You can now add the questions to these pages.

8. Select the question in the Available Questions menu on the desired page and click **Add Question**. The question will then be displayed in the Page Layout panel indicating that it is now on that page of the survey. If you need to create a question, refer to Chapter 5.

At this point, you can continue to build the survey layout on page 3 by adding more branches if needed. Repeat the previous steps as necessary.

9. When you finish adding or creating questions for the branch survey layout, click **Survey Workbench** to return to the Survey Workbench, or click **Launch Survey** to launch your survey. Refer to "Launching a Survey" on page 4-28 for instructions.

To review the steps in the branching layout, we created a layout that contains one branch in the main line of questions. If the participant takes the branch, they will go to page 2, answer the questions, and then return to the main line of questions on page 3. Participants who do not take the branch will skip the questions on page 2 and continue with the main line of questions on page 3.

This example shows you the basic procedure for creating a survey layout using tree logic. As you become familiar with the process of creating branches, you will be able to design a strategy that is most useful for you.

Previewing a Survey

In addition to previewing each page in a survey as you create the layout, you can also preview the design and graphical formatting of an entire survey both before and after the survey has been launched.

The preview page displays all of the pages in a survey. In Web surveys, each page contains Submit and Clear buttons and the RightNow Metrics logo (by default in the HTML bottom) at the bottom. The pages are separated by a line below the RightNow Metrics logo.

New

Note: You can change the text on any button that appears on the survey. See Table 4-2, “Survey Layout Page Field Descriptions,” on page 4-9 for a description of this feature, or step 4 on page 4-15 for specific instructions.

To preview a survey:

1. Select Preview from the Actions drop-down menu and click Go. Figure 4-12 shows a survey preview.

Path: Survey Workbench>Preview> Go

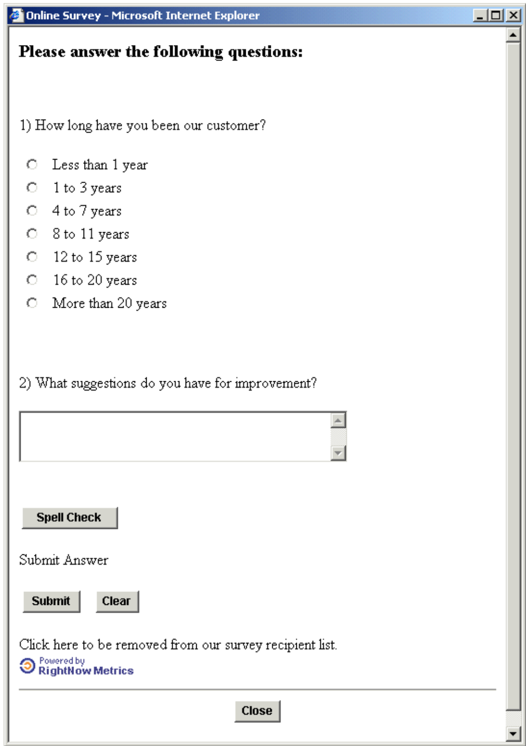


Figure 4-12: Previewing a Survey

2. Click Close to return to the Survey Workbench.

Editing a Survey Layout

You can add, remove, and rearrange questions or modify the layout of a survey at any time before launching it. For single- and multiple-page surveys, which do not have a complex structure, you can easily modify them in a straightforward fashion.

For branching survey layouts, you can also modify the layout; however, because branching layouts can have a complex structure of relationships between the pages, branches, questions, and specific answer choices, even a slight alteration can have a significant impact on the layout. Before you modify a branching layout, it is important to understand how the modifications will affect the survey layout. For specific information on how editing a survey layout may affect the overall flow, refer to Table 4-5, "Results of Editing Survey Questions, Branches, and Pages," on page 4-25.

To edit a survey layout:

1. Select Add/Remove Questions from the Actions drop-down menu and click Go.

Path: Survey Workbench>Add/Remove Questions> Go

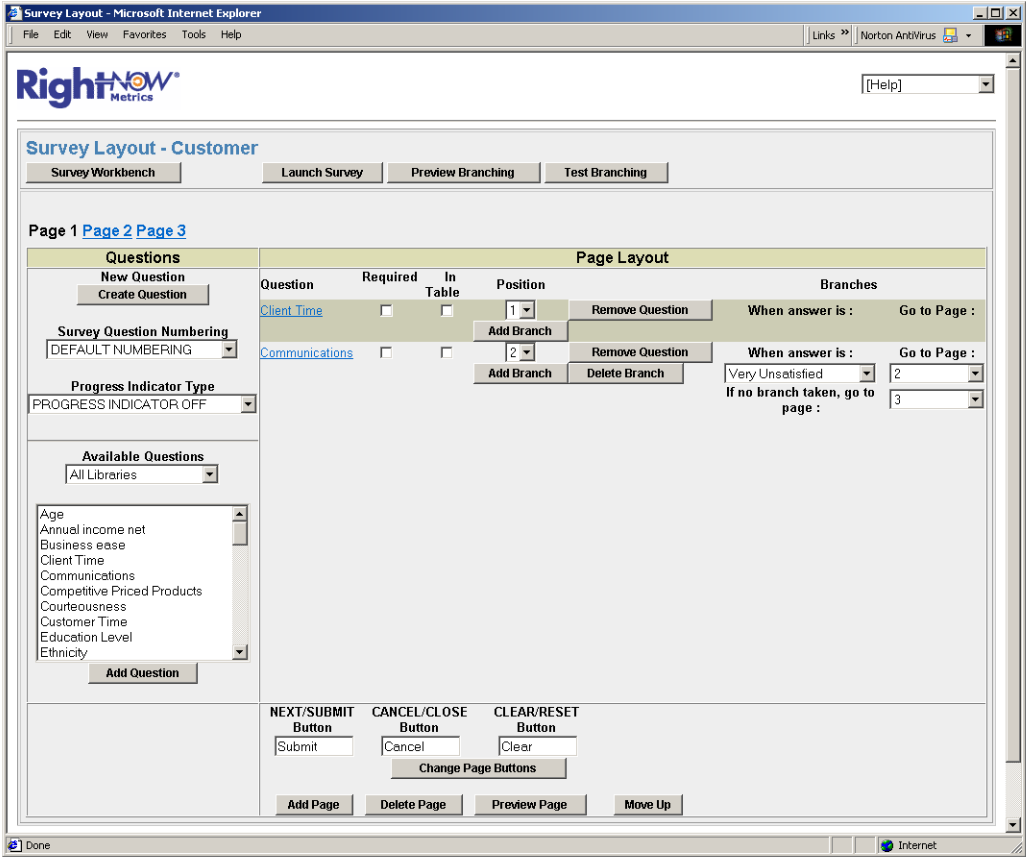


Figure 4-13: Survey Layout Page

Note: Keep in mind that all actions you perform on the Survey Layout page will automatically be saved. Because this page does not have a cancel feature, be cautious as you make edits.

2. Make any necessary modifications to the survey questions and layout. Refer to Table 4-5 for a description of the results of each edit made to a survey layout.

3. Click Survey Workbench to return to the Survey Workbench page.

Table 4-5: Results of Editing Survey Questions, Branches, and Pages

Action	Effect on Survey Layout
Editing a question	When editing multiple choice and range questions, if you delete or change an answer choice used in a branch, those branches will be deleted.
Adding a question	Any question you add to a page will be positioned after the last question on the page. In addition, you cannot add the same question more than once to a survey.
Removing a question with no branches	If you delete a question, the position of the other questions on the page will automatically be reordered.
Removing a question with branches	If you delete a question with branches, the position of the other questions on the page will automatically be reordered. The page(s) that the branch(es) pointed to may no longer be used in the survey or the page(s) will become part of the main line of questions.
Changing the position of a question	If you change the position of a question, the position of the other questions on the page will automatically be reordered.
Adding a branch	If you add a branch, you will need to specify a When Answer Is value and a Go to Page value. A new branch will be placed after the last branch for that question.
Deleting a branch	If you delete a branch, the page(s) that the branch(es) pointed to may no longer be used in the survey or the page(s) will become part of the main line of questions.
Changing the When Answer Is value	If you change this value, the branch will be triggered by the new answer choice.
Changing the Go to Page value	If you change this value, the page that will display if the branch is taken will be the new page you specify.
Adding a page	If you add a page, the page will be positioned after the last page of the survey. Pages cannot be inserted between pages but can be reordered once they are added.
Deleting a page that has no branch pointing to it	If you delete a page that has no branch pointing to it, the position of the pages following this page will be reordered. The Go to Page values for branches and pages that preceded this page will be adjusted automatically to point to the same locations.
Deleting a page that has a branch pointing to it.	If you delete a page that has a branch pointing to it, the Go to Page value for the branch will remain the same. This means that the Go to Page will now be the page that followed the one that was deleted.

Table 4-5: Results of Editing Survey Questions, Branches, and Pages (Continued)

Action	Effect on Survey Layout
Changing the If No Branch Taken, Go To value	If you change this value, the page that will display if no branch is taken will be the new page you specify.

Copying a Survey

You can create a new survey by copying an existing survey. This saves time when you want to create a survey that is similar to an existing one but with a few modifications. When you copy a survey, all of the settings, questions, and survey layout are copied. All you have to do is name the new survey.

To copy an existing survey:

1. Select Copy from the Actions drop-down menu next to the appropriate survey and click Go.
2. Type the name of the new survey in the Survey Name field.
3. Click Save to save the new survey.

Deleting a Survey

You can permanently delete a survey whether it has been launched or not. Select Delete from the Actions drop-down menu next to the survey and click Go.

Note: Deleting a launched survey will also permanently delete all results of that survey.

Launching a Survey

Once you complete your survey layout, you are ready to launch the survey. But before you invoke the Launching Survey wizard to guide you through the process, you need certain information in order to define your survey settings. Review the following list to make sure you have the necessary information when launching your survey.

- For surveys sent as email, you must establish an email mailbox to receive survey results.
- For email surveys or surveys you will use to send links via email, you need an email subject line, introduction, and trailer.
- For HTML surveys, you must decide on text and graphic elements you want displayed on the top and bottom of the survey.
- For Closed-Incident surveys, you must establish a mailbox to receive trigger emails from a CRM software package. This mailbox can be the same as the mailbox used to receive results. For information about setting up trigger emails, refer to the *RightNow Metrics 4.3 Installation Guide*; for information about how trigger emails affect sending rules, refer to “Applying Sending Rules to Closed-Incident Surveys” on page 6-32.
- New: If you want to be notified when there is a problem with any network, server, mailbox, or password settings you have defined when launching a survey, you must create an email notification *beforehand*. This feature ensures that the information you define in your survey settings is accurate and that your surveys will be properly sent. Refer to “Creating Email Notifications” on page 9-5 for instructions on creating an email notification.

The Launching Survey wizard consists of a series of screens, each one addressing specific elements that RightNow Metrics needs to successfully launch your survey. Launching a survey consists of the following steps:

1. Select the type of survey you want to send (see Figure 4-14, “Launching Survey Wizard—Select Survey Type,” on page 4-29).

2. Select the method for distributing the survey (see Figure 4-15, “Launching Survey Wizard—Select Survey Distribution,” on page 4-30).

3. Select survey settings, including when to send the survey, how many surveys to send, and whether or not to apply a notification rule to your survey (see Figure 4-16, “Launching Survey Wizard—Select Survey Settings,” on page 4-31).

4. Define the email settings for your survey (see Figure 4-17, “Email Information Page—Closed-Incident Survey,” on page 4-34).

Procedures for launching Closed-Incident and On-Demand surveys follow. While the procedures are similar, some of the settings are unique to each survey type. Refer to “Launching a Closed-Incident Survey” on page 4-29 and “Launching an On-Demand Survey” on page 4-40 for specific instructions.

Launching a Closed-Incident Survey

Closed-Incident surveys can be used when RightNow Metrics is integrated with RightNow eService Center or another CRM package and are automatically sent to customers after their incidents have been closed (solved). If you have more than one Closed-Incident survey, you can specify which one to send out and also define rules to trigger the survey in specific incidents. For more information on sending rules for Closed-Incident surveys, see “Applying Sending Rules to Closed-Incident Surveys” on page 6-32.

To launch a Closed-Incident survey:

1. Select **Actions** [Launch Survey] from the Actions drop-down menu next to the appropriate survey and click [Go].

Path: Survey Workbench>Launch Survey> [Go]

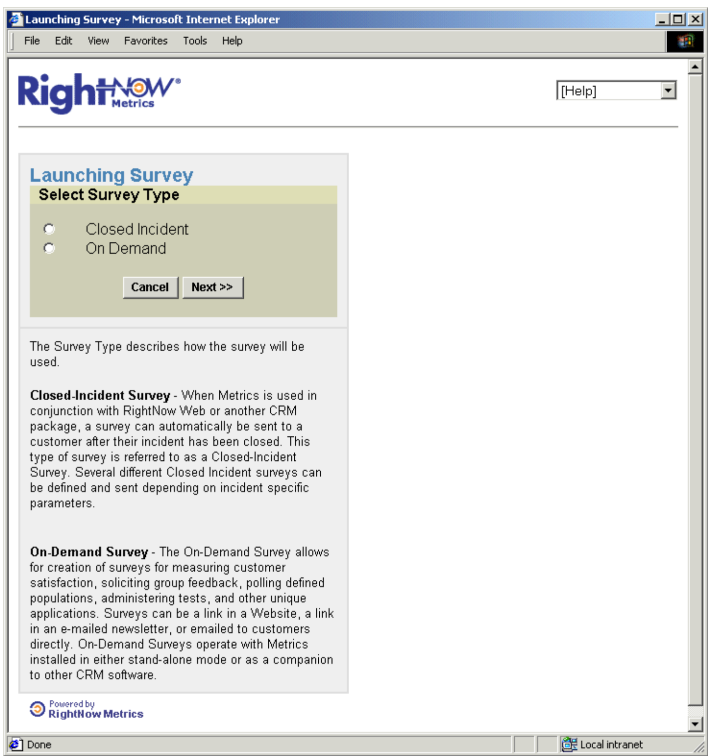


Figure 4-14: Launching Survey Wizard—Select Survey Type

2. Select the Closed-Incident radio button and click [Next >].

   Note: Each page of the Launching Survey wizard contains descriptions of the settings on that page.

Path: Survey Workbench>Launch Survey

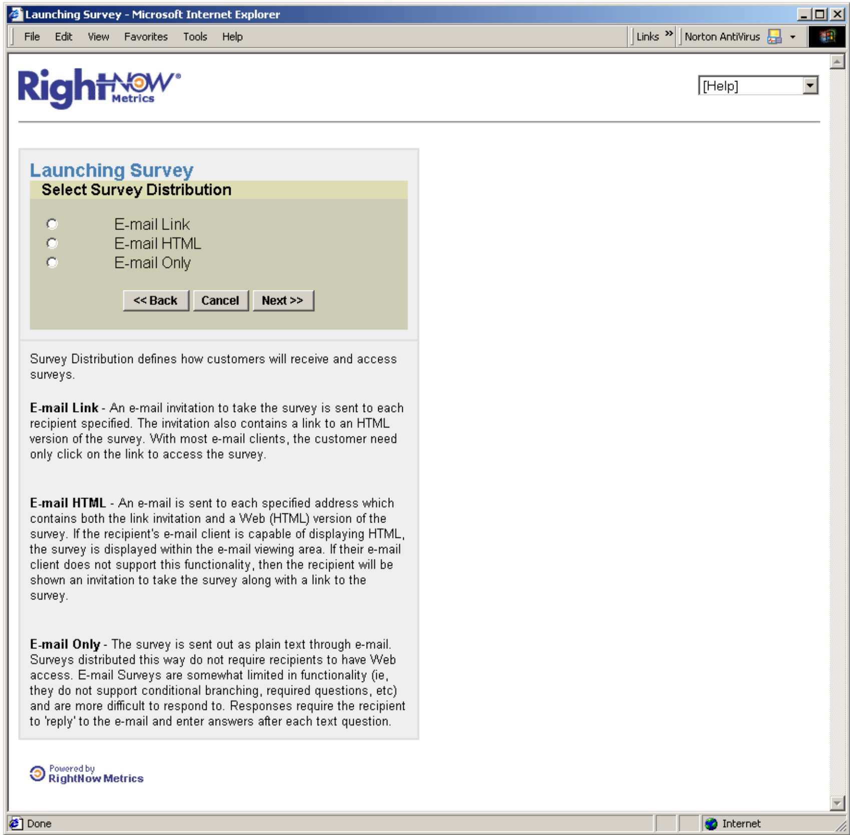


Figure 4-15: Launching Survey Wizard—Select Survey Distribution

3. Select the distribution method for the survey (see “Determine the Distribution Method” on page 3-5) and click Next >.

Note: To cancel at any time and return to the Survey Workbench, click Cancel. To return to the previous page, click < Back.

Path: Survey Workbench>Launch Survey

Figure 4-16: Launching Survey Wizard—Select Survey Settings

4. Select the settings for the survey, referring to Table 4-6 for descriptions of the options available and click Next >.

Table 4-6: Select Survey Settings Field Descriptions

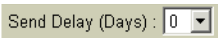
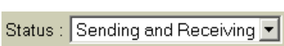
Field/Button	Description
	Click this drop-down menu to select the number of days to delay sending the Closed-Incident survey after the trigger email has been received by RightNow Metrics. This setting is based on the next occurrence of 12:01 A.M., and the next scheduled time the *pollster* utility will run as set in your system's cron (UNIX) or Task Scheduler (Windows). For more information about the *pollster* utility, refer to the *RightNow Metrics 4.3 Installation Guide.* **Note:** This menu appears for Closed-Incident surveys only.
0 days	The survey will be sent the next time *pollster* runs after the trigger email is received.
1 day	The survey will be sent the first scheduled time *pollster* runs after the first occurrence of 12:01 A.M. For example, if the trigger email is received at 6:00 P.M., the survey will be sent 6 hours later at 12:01 A.M.
2 days	The survey will be sent the first scheduled time *pollster* runs after the second occurrence of 12:01 A.M. For example, if the trigger email is received at 6:00 P.M., the survey will be sent 30 hours later at 12:01 A.M.
	Click this drop-down menu to select the percent of surveys to send. A random number generator returns a send / no-send signal based on the specified percent for each email address in the list or for each trigger email received. For example, if a list of 100 email addresses is used for an On-Demand survey with a percent to mail of 10%, the random generator determines whether or not a survey will be sent for each address. In effect, there will be only a 10% chance that a survey will be sent to any single email address. Of the 100 email addresses used, approximately 10 will actually be sent surveys.
	Click this drop-down menu to select the survey status. This determines if more surveys will be sent and if responses will be accepted for a survey. The statuses include Sending and Receiving, Receiving, or Halted.
Sending and Receiving	Select this status to allow surveys to be sent and received. Choose this setting for an on-going Closed-Incident survey. **Note:** This status applies to Closed-Incident surveys only.
Receiving	Select this status to allow survey responses to be received. This status will restrict any more surveys from being sent. Choose this status for an on-going On-Demand survey and also when you want to end a Closed-Incident survey, but you do not want to restrict people from submitting responses.

Table 4-6: Select Survey Settings Field Descriptions (Continued)

Field/Button	Description
Halted	Select this status to restrict both the sending of more surveys and the receiving of more survey responses. Choose this status when you want to terminate an On-Demand or Closed-Incident survey but still want access to the survey results.
On Survey Completion : Thank You Page	Click this drop-down menu to select what participants will see when they submit their completed survey. Options include Thank You Page, Results Page, or Results Link.
Thank You Page	Select this option to send participants to a Web page thanking them for their participation after they have submitted their survey.
Results Page	Select this option to send participants directly to a Web page containing the survey results.
Results Link	Select this option to give participants a link to a Web page containing the survey results.
Notification Rule : [none]	Click this drop-down menu to select an email notification so you can be notified when there is an error with any of your survey settings (network, server, mailbox, password). You must create an email notification *before* you launch your survey. Refer to "Creating Email Notifications" on page 9-5 for procedures on setting up an email notification.

New

Path: Survey Workbench>Launch Survey

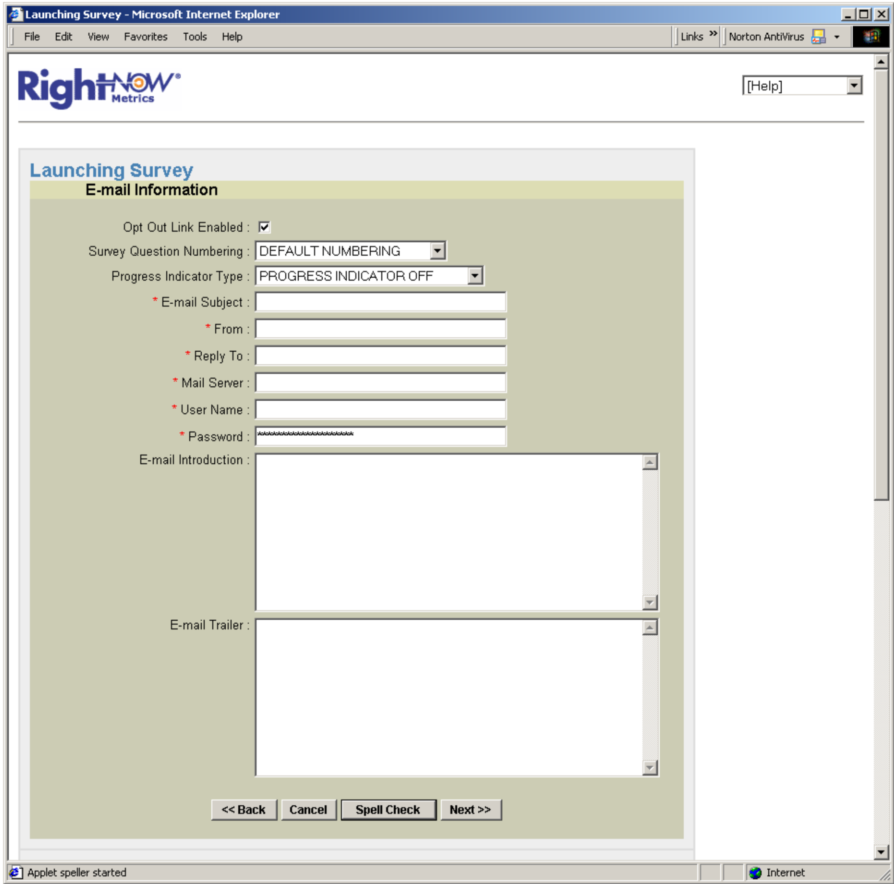


Figure 4-17: Email Information Page—Closed-Incident Survey

5. Fill in the fields on the Email Information page. Fields marked with an asterisk are required fields. For a description of the fields on this page, see Table 4-7.

Table 4-7: Email Information Page Field Descriptions

Field/Button	Description
Opt Out Link Enabled	Select this check box to provide an opt out link on the survey. This will allow respondents to exclude themselves from future surveys.
Survey Question Numbering	Click this drop-down menu to change the way questions are numbered on the survey. Options include Default Numbering, Continuous Numbering, or No Numbers.

Table 4-7: Email Information Page Field Descriptions (Continued)

Field/Button	Description
Progress Indicator Type	Click this drop-down menu to change the progress indicator on the survey. Options include Progress Indicator Off (the default), Progress Bar Indicator, or Progress Number Indicator (displayed as a percentage).
Email Subject	Type the text you want in the subject line of the email message. (The email message contains the survey or a link to the survey.)
From	Type the email address to appear in the From field of the email. This field must contain a valid email address. To display only a name in the From field, type the person's name followed by a valid email address in angle brackets in the following format: **Jerry Smith <jsmith@company.com>** **Note:** Most email clients will display this name as the message sender.
Reply To	**On-Demand surveys:** For Email Link distribution, type a valid email address. This setting is used to meet POP3 protocol only and is not used otherwise. For Email HTML distribution, type the email address of the mailbox for collecting survey responses. This email address will only be used to meet POP3 protocol if the survey recipient responds to the survey via the survey link. For Email distribution, type the email address of the mailbox for collecting survey responses. **Closed-Incident surveys:** For the Email Only distribution method, your CRM software must be configured to send trigger emails to this address. For RightNow eService Center, this email address is specified in the following configuration setting: **RNW Common>Modules>RightNow Metrics Integration> RNM_E-MAIL_INTERFACE** The *pollster* utility will access this mailbox to parse the incoming mail for trigger emails. For Email Link and Email HTML distribution methods, type either the email address of the RightNow eService Center mailbox or the email address of the survey owner. This is necessary so that someone will be aware of any problems that might occur.
Mail Server	Type the name of the mail server for gathering incoming survey mail. This is the mail server of the Reply To email address and is usually in the form "servername.domain.com." Some email programs are configured to automatically download email messages off the mail server onto a user's local machine. If you access this mailbox with a client configured in this fashion, *pollster* will not be able to access survey responses or trigger emails.

Table 4-7: Email Information Page Field Descriptions (Continued)

Field/Button	Description
User Name	Type the user name of the mailbox to be used for receiving email for this survey. **Note:** This mailbox should be dedicated to receiving RightNow Metrics email. Mail in this box will be automatically read and deleted.
Password	Type the password for the Reply To mailbox. The *pollster* utility uses this password to access the survey responses and trigger emails from this mailbox.
Email Introduction	Type the text you want to display in the email above the survey link or survey text, depending on the survey distribution method. This can be in text or HTML format.
Email Trailer	Type the text you want to display in the email below the survey link or survey text, depending on the survey distribution method. This can be in text or HTML format.
Spell Check	Click this button to open the Spell Checker. See "Using Spell Check" on page 4-46.

6. To check the spelling of the text you have added, click Spell Check. For more information on this feature, refer to "Using Spell Check" on page 4-46.

7. Click Next > to continue.

Note: If your survey will be distributed as an email link or email HTML, the Select Survey Style page will appear. This page will *not* appear if you are distributing the survey as email only.

Path: Survey Workbench>Launch Survey>Email Link or Email HTML

Figure 4-18: Selecting Survey Style

8. Select a survey style. To preview a particular style, click the style link.

9. Click Next > to continue, or select the Customize HTML check box to customize the style you have chosen and click Next >.

New

Note: If you select the Customize HTML check box, the Launching Survey HTML Information page will appear.

New

Path: Survey Workbench>Launch Survey>Select Survey Style>Customize HTML

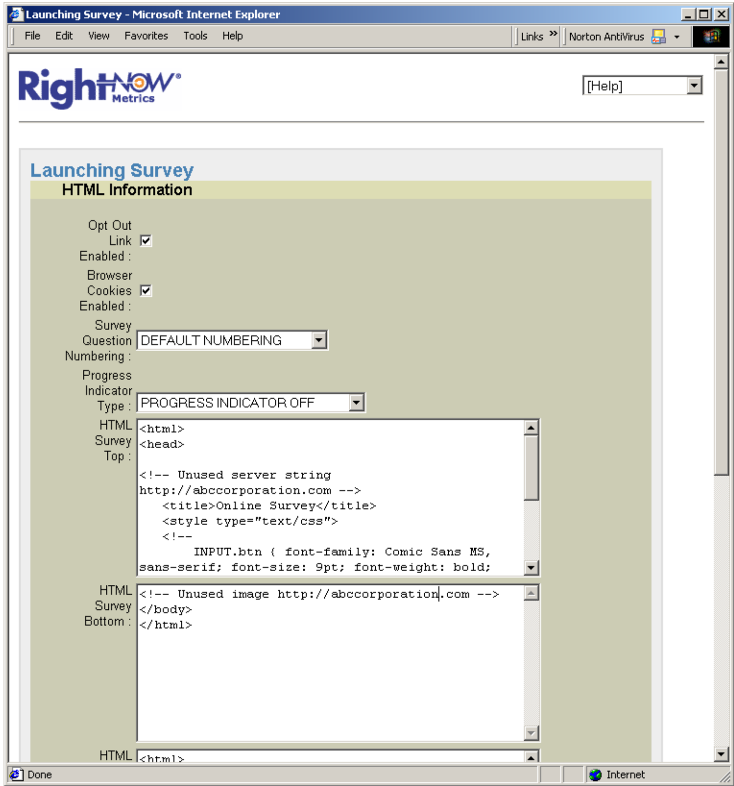


Figure 4-19: Launching Survey HTML Information Page

10. Edit the HTML as necessary and click Next >.

Path: Survey Workbench>Launch Survey

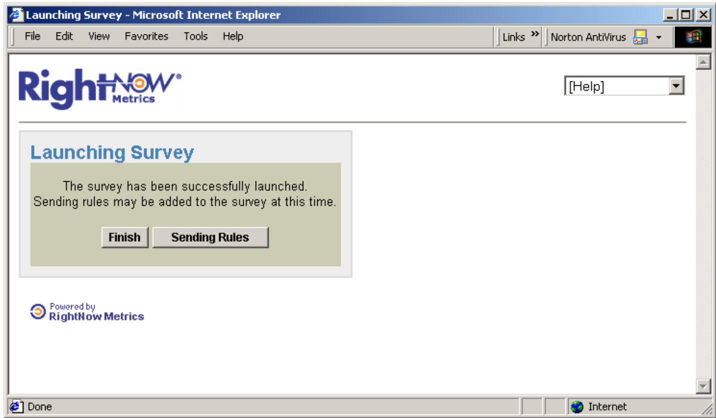


Figure 4-20: Launching Survey—Complete

11. To add sending rules to the Closed-Incident survey, click Sending Rules. Refer to Chapter 6 for information about creating and adding sending rules.

12. Click Finish to launch the survey.

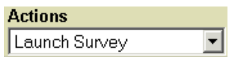
Launching an On-Demand Survey

You can launch an On-Demand survey whenever you want to target a specific audience regarding any topic (measuring customer satisfaction, opinions, product intelligence, or any other area of interest). On-Demand surveys are triggered when you launch them, but can be scheduled to send out at a later date. You can also use this survey type to create a Web page for your survey.

You can create On-Demand surveys for RightNow Metrics installed in either standalone mode or as an add-on module to RightNow eService Center. On-Demand surveys can be part of your Web site or emailed to customers or potential customers.

To launch an On-Demand survey:

Note: Any pages of the Launching Survey wizard that are the same as that for Closed-Incident surveys are not repeated in this section but are cross-referenced for your review.

1. Select 

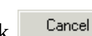
from the Actions drop-down menu next to the survey and click 

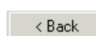
.

2. Select the On-Demand radio button and click 

(see Figure 4-14, "Launching Survey Wizard—Select Survey Type," on page 4-29).

3. Select the method you want to use to distribute your survey (see Figure 4-15, "Launching Survey Wizard—Select Survey Distribution," on page 4-30). For a description of the methods available, see "Determine the Distribution Method" on page 3-5.

   Note: To cancel at any time and return to the Survey Workbench, click 

. To return to the previous page, click 

.

Path: Survey Workbench>Launch Survey

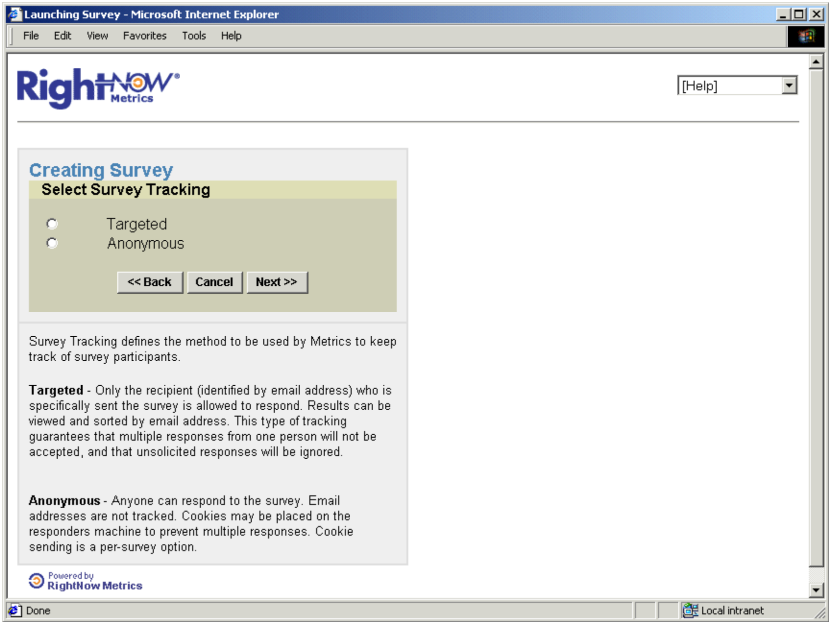


Figure 4-21: Launching Survey Wizard—Select Survey Tracking

When launching an On-Demand survey distributed by email link or email HTML, you have the option to track the survey participants and respondents.

Targeted—In Targeted tracking, only the person who was sent the survey is allowed to respond. The email addresses are placed in the database, and you can view a list of email addresses for everyone who responds to the survey. (For more information on viewing the email addresses of the survey participants, see “Viewing Participants Report” on page 7-25.)

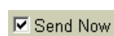
Note: When sending a Targeted email link survey, you cannot use a group name (for example, staff@<yourcompany>.com) to send to all staff members. The Targeted tracking type will recognize this as only one email participant and allow only one response.

Anonymous—Anonymous tracking does not require an email address from the participant and can be accessed via the Internet; therefore, a list of the respondents’ email addresses cannot be stored.

4. Click the Targeted radio button to select Targeted tracking, or click the Anonymous radio button to select Anonymous tracking. Click Next >.

Path: Survey Workbench>Launch Survey

Figure 4-22: Launching Survey Wizard—Set Schedule

5. Select a date to schedule the survey or select 

to send the survey immediately after you launch it.

Changed

6. Click the Select Email Addresses drop-down menu to select the email addresses for the survey. Your options include No Selection (the default), All, Manual Selection, Previously Surveyed, or Enter New.

7. Click 

.

Path: Survey Workbench>Launch Survey

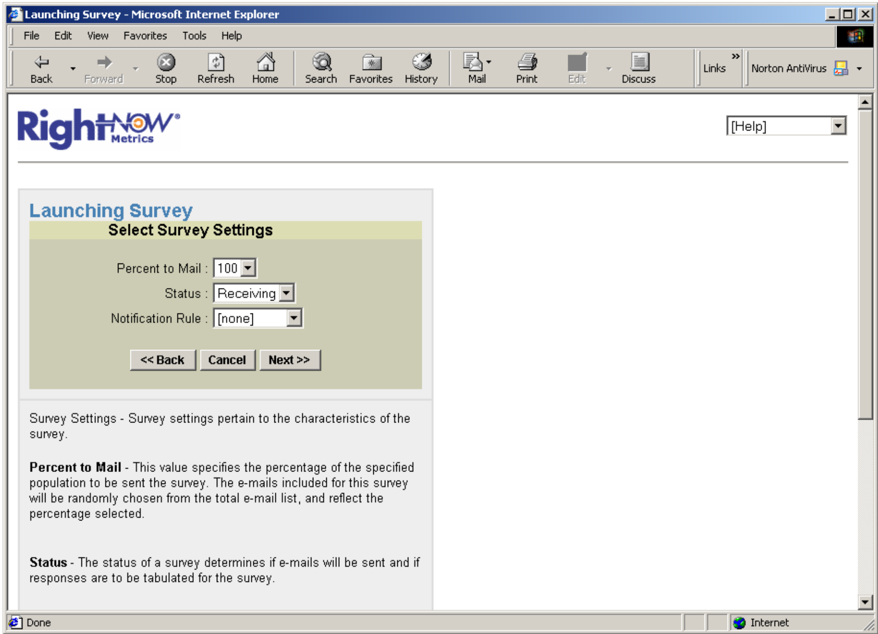


Figure 4-23: Launching Survey Wizard—Select Survey Settings

8. Select the survey settings and click Next >. For a description of each survey setting, see Table 4-6, “Select Survey Settings Field Descriptions,” on page 4-32.

Note: Survey settings are the same as those for Closed-Incident surveys except for the Send Delay option. For On-Demand surveys, you set the date to send the survey on the Set Schedule page of the wizard (see Figure 4-22, “Launching Survey Wizard—Set Schedule,” on page 4-42).

Path: Survey Workbench>Launch Survey

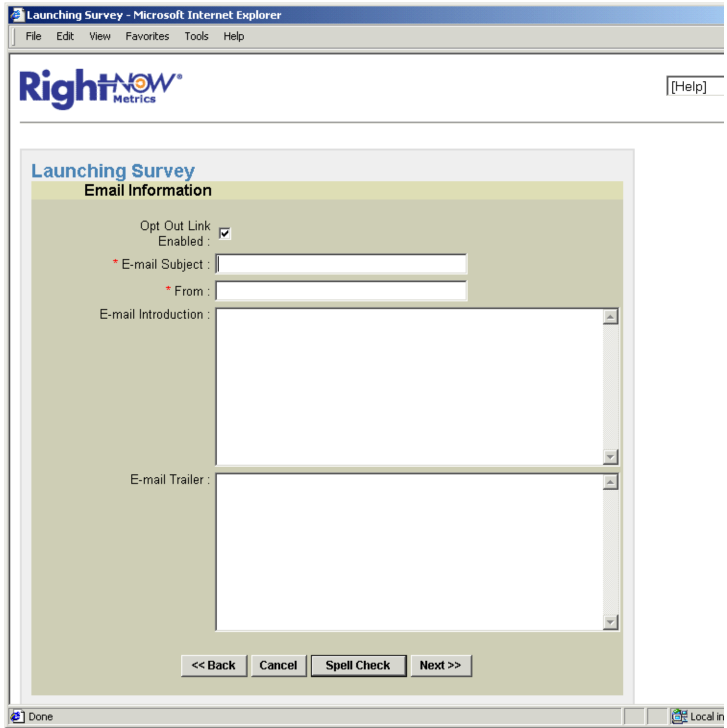


Figure 4-24: Email Information Page—On-Demand Email Link or Email HTML Survey

Path: Survey Workbench>Launch Survey

Figure 4-25: Email Information Page—On-Demand Email Survey

9. Enter the information required. For a description of the fields on this page, see Table 4-7, "Email Information Page Field Descriptions," on page 4-34.

10. To the spelling of the text you have added, click Spell Check. Refer to "Using Spell Check" on page 4-46. Click Next >.

11. When sending an Email Link or Email HTML survey, select a survey style or select the Customize HTML check box to customize the style (see Figure 4-18, "Selecting Survey Style," on page 4-37). To preview a survey style, click the style link Click Next >.

12. Click Finish to launch the survey.

This completes the procedures for the main functions performed from the Survey Workbench. The last section in this chapter describes the spell check function in RightNow Metrics.

Using Spell Check

You can check the spelling of any text you add on the Email Information and Editing Question pages. Click **Spell Check** and the Spell Checker will open if there are misspelled words. If there are no misspelled words, the “Loading Dictionary” message will disappear after a few moments.

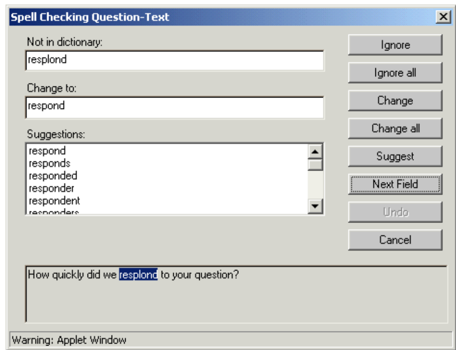


Figure 4-26: Spell Checker

Note: RightNow Metrics is also configured so that participants in Web surveys can spell check their short answer responses. To disable this feature, change the following configuration setting:

RightNow Metrics>General>Survey Settings> SURV_CLIENT_SPELLCK_ENABLED

Table 4-8: Spell Check Button Descriptions

Button	Definition
Ignore	Click this button to ignore this instance of the word.
Ignore all	Click this button to ignore all instances of this spelling of the word.
Change	Click this button to accept the spelling of the word listed in the Change To box.
Change all	Click this button to change all instances of the misspelled word to the suggestion listed in the Change To box.
Suggest	Click this button if you are unsure of the spelling of the word and want a suggestion.
Next Field	Click this button to skip the current text box area and move to the next.
Undo	Click this button to undo the last change made.

Questions

The Questions console is your main tool for creating, reviewing, and editing questions for your surveys. When you invoke the Creating Question wizard from the Questions console, you can create questions independent of surveys. And once questions have been created, you can easily create your survey and add questions through the Creating Survey wizard.

From the Questions console, you can perform the following actions:

- **Create libraries**—You can create question libraries through the Creating Library wizard for storing and organizing your questions. For example, you could create different libraries of questions for each of your products, or create libraries that categorize questions as product-related or customer service-related. Refer to “Question Libraries” on page 5-5.
- **View libraries**—You can view a question library to see which questions are contained in that library. Refer to “Question Libraries” on page 5-5.
- **Create questions**—You can create questions for use in your RightNow Metrics surveys. When creating a question, you have the option of choosing from six question types, including range, short answer, multiple choice, check all, text, and spaces. The Creating Question wizard leads you through each element of creating your questions. Refer to “Creating a Question” on page 5-7.
- **Edit questions**—In addition to creating questions, you can also copy existing questions and edit question properties to create new questions. When a question is edited or deleted, the change will take effect in each unlaunched survey that contains the question, but will not affect any launched surveys that contain the question. Refer to “Editing and Deleting Questions” on page 5-25.

This chapter introduces the Questions console of RightNow Metrics and includes procedures for creating questions for all question types. Also included are procedures for editing, copying, and deleting questions, and creating libraries.

Key Terms

The following definitions of the terminology discussed in this chapter will assist you as you learn the functions of the Questions console and move around the Questions page.

Creating Question wizard—A utility that assists you in creating questions.

Question Library—A function of the Questions console for organizing questions into categories.

Question Type—RightNow Metrics provides six question types that will enable you to gather valuable information from your customers:

> **Range**—A question type that has a specified numerical range of answer choices.
>
> **Short Answer**—A question type without any specified answer choices in which respondents can answer in their own words.

Multiple Choice—A question type that has specified answer choices in which respondents can choose only one.

Check All—A question type that has specified answer choices in which the respondent can choose as many as apply.

Text—A formatting feature for adding text or graphics between survey questions.

Spaces—A formatting feature for adding extra spaces between survey questions.

Navigating the Questions Page

Click **Questions** from any page in RightNow Metrics. (The navigation bar is not available when you are using one of the RightNow Metrics wizards.)

The Questions page displays the entire list of questions from all surveys, including question type, which library each question is stored in, and which surveys contain each question. From this page you can create questions and libraries and preview, edit, copy, and delete questions.

Path: Questions

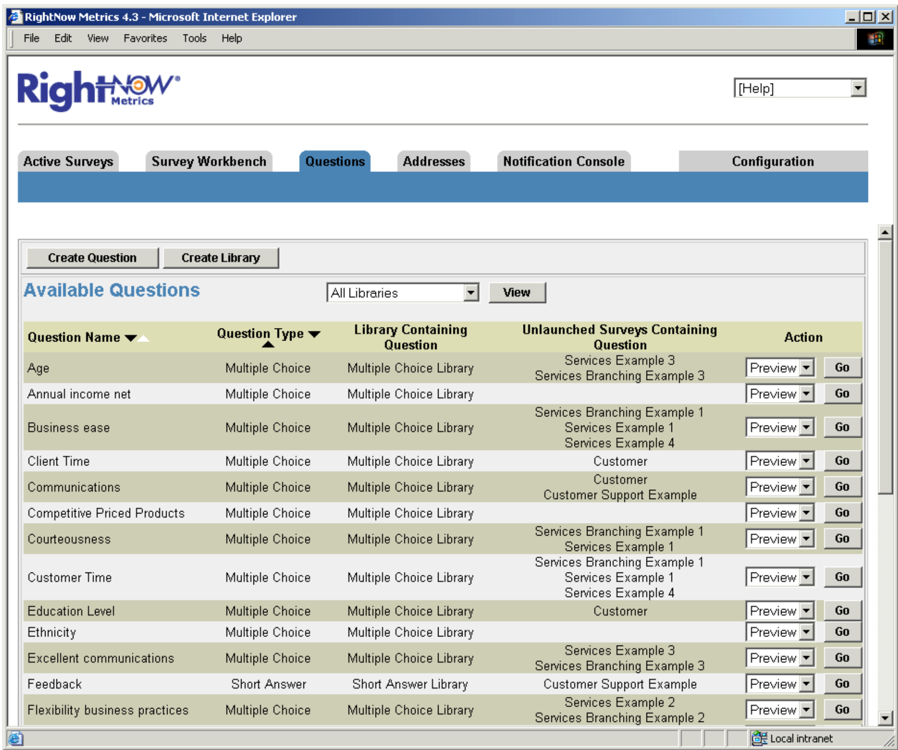


Figure 5-1: Questions Page

Table 5-1 describes each field and button on the Questions page.

Table 5-1: Questions Page Field Description

Field	Description
Create Question	Click this button to invoke the Creating Question wizard.

Table 5-1: Questions Page Field Description (Continued)

Field	Description
Create Library	Click this button to invoke the Creating Library wizard.
All Libraries	Click this drop-down menu to select a library.
View	Click this button to view the library selected in the library drop-down menu.
Question Name	This column displays the name of the question.
Question Type	This column displays the question type: Range, Short Answer, Multiple Choice, Check All, Text, or Spaces.
Library Containing Question	This column displays the library where the question is stored.
Unlaunched Surveys Containing Question	This column displays all unlaunched surveys that contain the question.
Preview	Click this drop-down menu to select one of the following actions: Preview, Edit, or Delete.
Go	Click this button to perform the action selected in the Action drop-down menu.
Next Page	Click this link to go to the next page.
Previous Page	Click this link to go to the previous page.
[Help]	Click the Help drop-down menu to select one of the following: Help On This Page, Help Contents, About Metrics, or Other Resources.

Question Libraries

Question libraries provide an easy way for you to organize your questions, and you can create as many question libraries as needed to categorize your questions. You can view the questions contained in each library by clicking the drop-down menu on the Questions page and selecting a specific library, or view all questions in your database using the default All Libraries option in the drop-down menu.

To create a question library:

1. From the Questions page, click Create Library. This will invoke the Creating Library wizard.

Path: Questions> Create Library

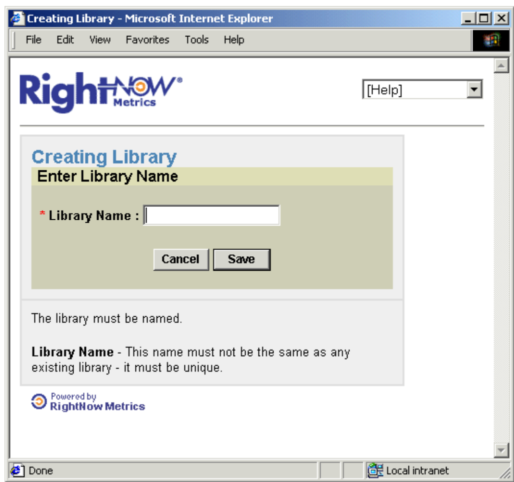


Figure 5-2: Creating Library Page

2. Type the name of the library and click Save to save the new library.

3. To cancel and return to the Questions page, click Cancel.

To view a library:

Click All Libraries to select the library you want to view, and then click View.

Path: Questions>View Library

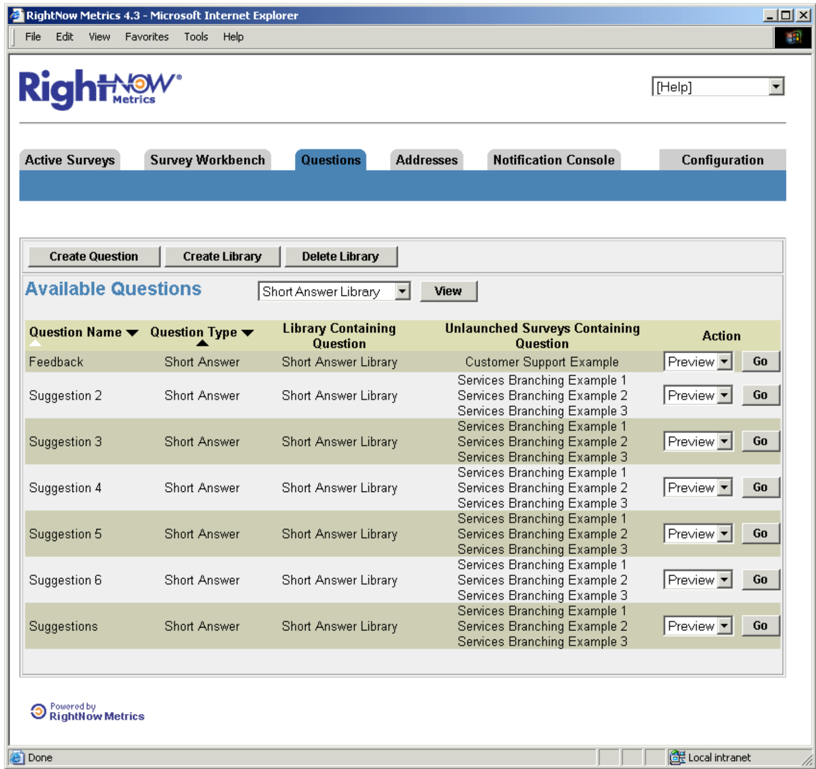


Figure 5-3: Questions Page—Viewing a Library

Note: When you select a specific library to view, the Delete Library button appears above the list of available questions for that library. This button is not present on the main Questions page since you are viewing all of the questions from all libraries in your database.

To delete a question library:

1. Select the library from the drop-down menu and click View.
2. Click Delete Library to delete the library.

   Note: Deleting a library will not delete the questions it contains. Those questions are moved to the Generic library.

Creating a Question

Questions are the fundamental elements of a survey. In RightNow Metrics, one question can be used in multiple surveys to avoid having to duplicate the question for every survey in which a particular question is needed.

The Creating Question wizard will guide you through the process of creating questions. The path of the Creating Question wizard depends on the type of question you choose. This section contains procedures for creating each type of question and includes a sample of each type.

- **Range**—This question type has a specified numerical range of answer choices used to rate the respondent's opinion. Refer to "Creating a Range Question" on page 5-8.
- **Short Answer**—A short answer question has no specified answer choices and respondents can answer in their own words. Refer to "Creating a Short Answer Question" on page 5-12.
- **Multiple Choice**—A multiple choice question has a limited number of specified answer choices from which the respondent can choose just one. Refer to "Creating a Multiple Choice Question" on page 5-14.
- **Check All**—This question type has a number of specified answer choices from which the respondent can choose as many as apply. Refer to "Creating a Check All Question" on page 5-18.
- **Text**—This is used as a formatting feature to add text or graphics between survey questions. Refer to "Creating a Text Question" on page 5-21.
- **Spaces**—This is used as a formatting feature to add extra spaces between survey questions. Refer to "Creating Spaces" on page 5-23.

New

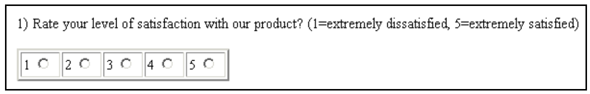
Note: You should determine how you are going to use the results of your survey before choosing which types of questions to create. There are advantages and disadvantages in how the results for each question type can be used. The results of range, multiple choice, and check all questions can be compiled for statistical analysis and graphical display. The results of short answer questions cannot be compiled for analysis, although short answer questions give respondents the opportunity to answer in their own words, and this direct feedback can be extremely valuable.

Creating a Range Question

Range questions have a specified range of answer choices used to rate respondents' preferences and opinions. Range questions commonly pertain to rating product satisfaction or service. Results can be compiled for statistical analysis and graphical display.

Determining the proper scale is important in obtaining accurate and meaningful results. Generally, ranges should match the ability of the respondent to differentiate a single point rating. For example, in the range of 1 through 20, the difference between 17 and 18 is indistinguishable. Make sure the upper and lower ranges of the scale are clearly defined for each question and consistent throughout the survey.

The following is an example of a range question using the Email Link or Email HTML distribution method.



Note: If you set the range to have more than 10 choices (for example, range of 1 to 20, incremented by 1), a text box will display instead of radio buttons.

The following is an example of a range question using the Email distribution method.

```
Rate your level of satisfaction with our product? (1=extremely
dissatisfied, 5=extremely satisfied)
Please enter your answer (1,2,3, ... 5) below.
```

To create a range question:

1. From the Questions page, click **Create Question** to open the Creating Question wizard.

Path: Questions> **Create Question**

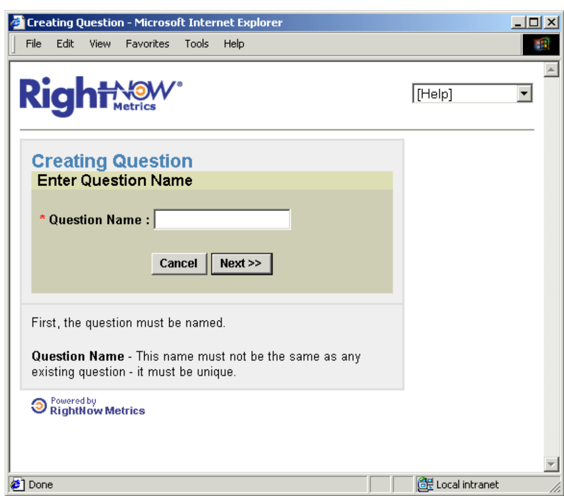


Figure 5-4: Creating Question Wizard—Enter Question Name

Note: To cancel at any time and return to the Questions page, click Cancel. To return to the previous page, click < Back.

2. Type the name of the question as it will appear throughout RightNow Metrics and click Next >. Choose a name that is unique and be as specific as possible.

Path: Questions> Create Question

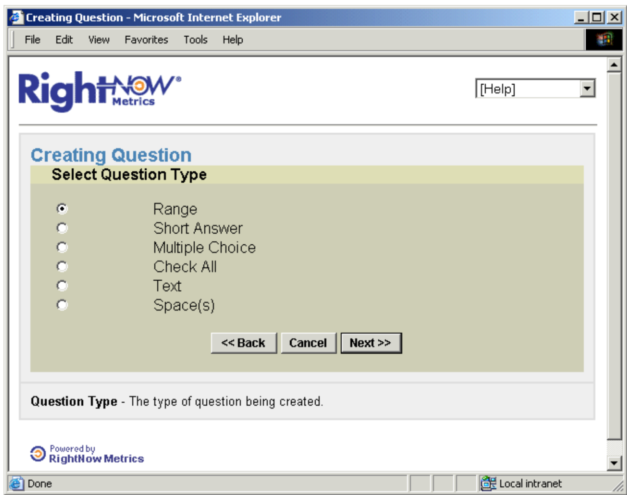


Figure 5-5: Creating Question Wizard—Select Question Type

3. Select the Range radio button and click Next >.

Path: Questions> Create Question

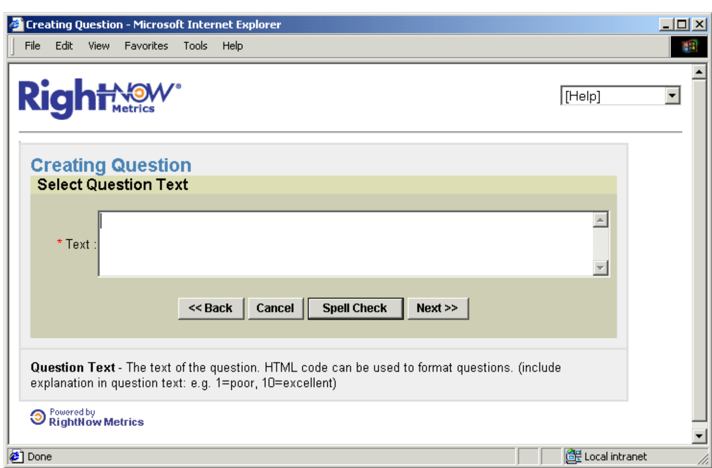


Figure 5-6: Creating Question Wizard—Enter Question Text

4. Type the actual question text that will be displayed in the survey.

   Note: You must include an explanation of the range in the text of your question (for example, 1=poor, 5=excellent). If the question will be distributed by email, or distributed by email link or email HTML and has more than ten choices, a text box will be displayed instead of radio buttons. You should also explain the range step (for example, 0=poor, 50=average, 100=excellent, increments of 10). You can use HTML code in this field to format text and add graphics in the email link and email HTML surveys only. When sending a survey by email link and email HTML, you cannot use special characters in the text of your question unless you use HTML to format those characters.

5. To spell check the question, click [Spell Check]. For more information on this feature, refer to "Using Spell Check" on page 4-46.

6. Click [Next >].

Path: Questions> [Create Question]

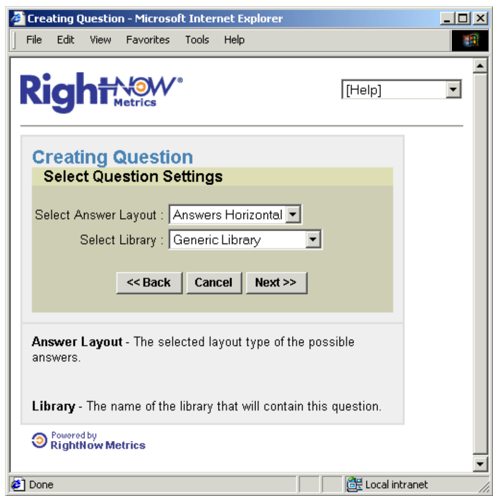


Figure 5-7: Creating Question Wizard—Select Answer Layout and Library

7. Select a layout for the range choice radio buttons from the Select Answer Layout drop-down menu. You can choose Answers Horizontal, Answers Vertical, or Pull Down Menu List.

8. Select a library to store the question in from the Select Library drop-down menu.

9. Click [Next >].

Path: Questions> Create Question

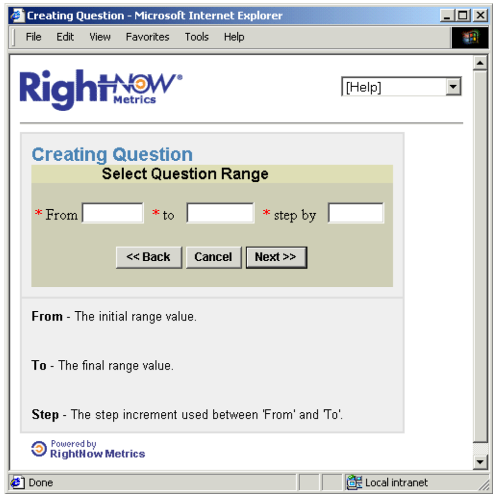


Figure 5-8: Creating Question Wizard—Select Question Range

10. Type the range minimum, the range maximum, and the range step or increment. The range should be narrow enough so the respondent can differentiate between a single point increment. For example, if you use 0=poor, 20=fantastic, increments of 1, the difference between 17 and 18 is not distinguishable.

11. Click Next >.

Path: Questions> Create Question

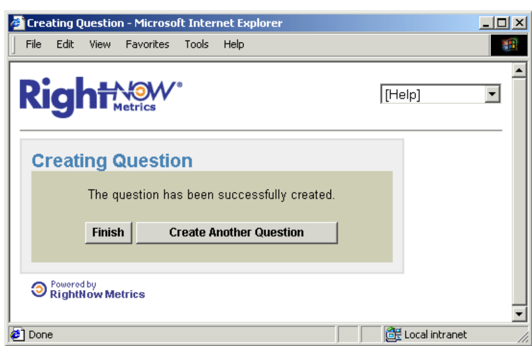


Figure 5-9: Creating Question Wizard—Finish

12. To return to the Questions page, click Finish; to create another question, click Create Another Question.

Creating a Short Answer Question

This question type is used for open questions without specified answer choices where respondents answer in their own words. Short answer questions are effective for receiving significant input and feedback from customers.

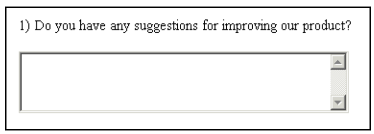
Because short answers may be time consuming for your customers, you would not want to create a survey composed largely of short answer questions because respondents would not likely spend the time or energy. In addition, since the results are displayed in text format, they are not easy to analyze or summarize in a chart.

Although short answers have a few drawbacks, the feedback received should not be underestimated. The short answer question provides the respondent with an opportunity to add comments that may not be available within structured questions, which can be very useful to your organization.

New

New to the short answer question type is the ability to specify the height and width of the answer text box. This allows you to customize each question to meet your specific formatting needs.

The following is an example of a short answer question using the Email Link or Email HTML distribution method.



The following is an example of a short answer question using the Email distribution method.

```
Do you have any suggestions for improving our product?
Please enter the text of your answer below.
```

To create a short answer question:

1. Click **Create Question** to open the Creating Question wizard. (See Figure 5-4, “Creating Question Wizard—Enter Question Name,” on page 5-8.)
2. Type the name of the question as it will appear throughout RightNow Metrics and click **Next >**. Choose a name that is unique and be as specific as possible.
3. Select the Short Answer radio button and click **Next >** (see Figure 5-5, “Creating Question Wizard—Select Question Type,” on page 5-9).
4. Type the actual question text that will be displayed in the survey (see Figure 5-6, “Creating Question Wizard—Enter Question Text,” on page 5-9).

   Note: You can use HTML code in this field to format text and add graphics in the email link and email HTML surveys only. When sending a survey by email link and email HTML, you cannot use special characters in the text of your question unless you use HTML to format those characters.

5. To spell check the question, click Spell Check. For more information on this feature, refer to “Using Spell Check” on page 4-46.

6. Click Next >.

Path: Questions> Create Question

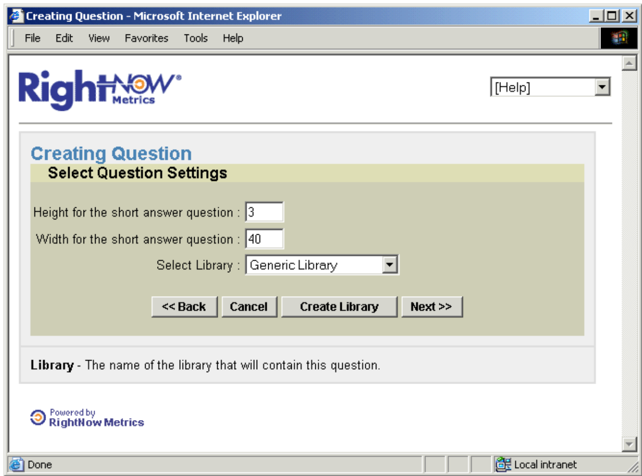


Figure 5-10: Creating Question Wizard—Select Question Settings

7. Type the height (number of lines) and width (number of characters) of the answer text box in the appropriate text boxes.

New

Note: The maximum number of characters allowed for the answer text of a short answer question is approximately 4000 characters; however, this number will vary depending on the size of the answer text box. For example, if you set the height at 1, the limit is 255 characters, while a height of 2 or more will accept up to the 4000 character limit. The 4000 character limit is not configurable.

8. Select the library you want to store the question in and click Next >. Your question is now saved.

9. To return to the Questions page, click Finish; to create another question, click Create Another Question (see Figure 5-9, “Creating Question Wizard—Finish,” on page 5-11).

Creating a Multiple Choice Question

Multiple choice questions have a limited number of specified answer choices in which the respondent can choose only one. Multiple choice questions can be used to limit the responses to a specific set of answer choices. Results can be compiled for statistical analysis and graphical display.

The following is an example of a multiple choice question using the Email Link or Email HTML distribution method.

1) How often do you shop/purchase from our company?

- ○ More than once a week
- ○ once a week
- ○ once a month
- ○ 3-4 times/year
- ○ never

Here is the same type of question in table format:

		Very Satisfied	Somewhat Satisfied	No Opinion	Somewhat Unsatisfied	Very Unsatisfied
5)	How satisfied are you with our customer service responsiveness?	○	○	○	○	○

Note: You can easily format your question and answer choices in a table from the Survey Layout page. Refer to Chapter 4, “Survey Workbench.”

The following is an example of a multiple choice question using the Email distribution method.

```
How often do you shop/purchase from our company?
   1=More than once a week
   2=once a week
   3=once a month
   4=3-4 times/year
   5=never
Please enter the number(s) of your choice(s) below.
```

To create a multiple choice question:

1. Click **Create Question** to open the Creating Question wizard. (See Figure 5-4, “Creating Question Wizard—Enter Question Name,” on page 5-8.)

2. Type the name of the question as it will appear throughout RightNow Metrics and click **Next >**. Choose a name that is unique and be as specific as possible.

3. Select the Multiple Choice radio button and click **Next >** (see Figure 5-5, “Creating Question Wizard—Select Question Type,” on page 5-9).

4. Type the actual question text that will be displayed in the survey (see Figure 5-6, “Creating Question Wizard—Enter Question Text,” on page 5-9). The maximum number of characters allowed for a multiple choice question is 255.

   Note: You can use HTML code in this field to format text and add graphics in the email link and email HTML surveys only. When sending a survey by email link and email HTML, you cannot use special characters in the text of your question or answer choices unless you use

HTML to format those characters.

5. To spell check the question, click Spell Check. For more information on this feature, refer to "Using Spell Check" on page 4-46.
6. Click Next >.
7. Select a layout from the Select Answer Layout drop-down menu (see Figure 5-7, "Creating Question Wizard—Select Answer Layout and Library," on page 5-10). You can choose Answers Vertical, Answers Horizontal, Two Columns, Three Columns, or Pull Down Menu List. The column layout options are especially effective when you have a large number of answer choices.
8. Select a library to store the question in from the Select Library drop-down menu.
9. Click Next >.

Path: Questions> Create Question

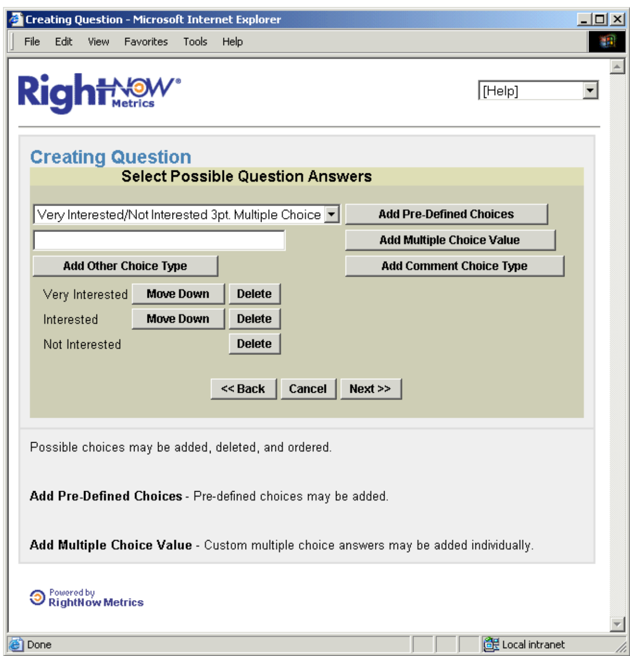


Figure 5-11: Creating Question Wizard—Select Possible Question Answers

10. Create your possible answer choices using the fields and buttons described in Table 5-2.

Table 5-2: Creating Question Wizard—Multiple Choice Descriptions

Field	Description
Add Pre-Defined Choices	Select one of the following predefined choices from the drop-down menu and click this button to add them as multiple choice options.
Yes / No 2 pt.	Select this option to add the following choices: Yes, No.
True / False 2 pt.	Select this option to add the following choices: True, False.
Male / Female 2 pt.	Select this option to add the following choices: Male, Female.
Agree / Disagree 5 pt.	Select this option to add the following choices: Strongly Agree, Somewhat Agree, No Opinion, Somewhat Disagree, Strongly Disagree.
Helpful / Unhelpful 5 pt.	Select this option to add the following choices: Very Helpful, Somewhat Helpful, No Opinion, Somewhat Unhelpful, Very Unhelpful.
Excellent / Poor 5 pt.	Select this option to add the following choices: Excellent, Good, Average, Below Average, Poor.
Always / Never 5 pt.	Select this option to add the following choices: Always, Often, Sometimes, Rarely, Never.
Satisfied / Unsatisfied 5 pt.	Select this option to add the following choices: Very Satisfied, Somewhat Satisfied, No Opinion, Somewhat Unsatisfied, Unsatisfied.
Great Extent / No Extent 5 pt.	Select this option to add the following choices: To a Very Great Extent, To a Great Extent, Neutral, To Some Extent, To No Extent.
Very Interested / Not Interested 3 pt.	Select this option to add the following choices: Very Interested, Interested, Not Interested.
Add Multiple Choice Value	Type an answer choice in the text box and click this button to add your own answer choice.
Add Other Choice Type	Click this button to add an answer choice for "Other." Respondents can type a choice that is not listed and select it as their answer.
Add Comment Choice Type	Click this button to add a text box for the respondent to type comments.
Move Down	Click this button to move an answer down one position.
Delete	Click this button to delete a multiple choice option.

New

11. Click Next >. Your question is now saved.

12. To return to the Questions page, click Finish; to create another question, click Create Another Question (see Figure 5-9, “Creating Question Wizard—Finish,” on page 5-11).

Creating a Check All Question

Check all questions have a limited number of specified answer choices in which respondents can choose as many as apply. This type of question allows you to create questions that do not force the participant into a particular answer. Check all questions can often eliminate the need for several Yes / No questions. Results can be compiled for statistical analysis and graphical display.

The following is an example of a check all question using the Email Link or Email HTML distribution method.

The following is an example of a check all question using the Email distribution method.

```
How did you hear about our products?
   1=Word of mouth
   2=Advertisement
   3=Newspaper
   4=Magazine Article
   5=Direct Mail
   6=At an Exposition
   7=TV Commercial
   8=Radio
   9=The Internet
   10=Other
Please enter the number(s) of your choice(s) below.
(Please separate using a comma eg. 1, 3)
```

To create a check all question:

1. Click [Create Question] to open the Creating Question wizard. (See Figure 5-4, “Creating Question Wizard—Enter Question Name,” on page 5-8.)
2. Type the name of the question as it will appear throughout RightNow Metrics and click [Next >]. Choose a name that is unique and be as specific as possible.
3. Select the Check All radio button and click [Next >] (see Figure 5-5, “Creating Question Wizard—Select Question Type,” on page 5-9).
4. Type the actual question text that will be displayed in the survey (see Figure 5-6, “Creating Question Wizard—Enter Question Text,” on page 5-9). The maximum number of characters allowed for a check all question is 255.

   Note: You can use HTML code in this field to format text and add graphics in the email link and email HTML surveys only. When sending a survey by email link and email HTML, you cannot use special characters in the text of your question or answer choices unless you use HTML to format those characters.

5. To spell check the question, click Spell Check. For more information on this feature, refer to “Using Spell Check” on page 4-46.

6. Click Next >.

7. Select a layout from the Select Answer Layout drop-down menu (see Figure 5-7, “Creating Question Wizard—Select Answer Layout and Library,” on page 5-10). You can choose Answers Vertical, Answers Horizontal, Two Columns, or Three Columns. The column layout options are especially effective when you have a large number of answer choices.

8. Select a library to store the question in from the Select Library drop-down menu.

9. Click Next >.

Path: Questions> Create Question

Figure 5-12: Creating Question Wizard—Select Possible Question Answers

10. Create your possible answer choices using the fields and buttons described in Table 5-3.

Table 5-3: Creating Question Wizard—Check All Descriptions

Field	Description
Add Selection	Type an answer choice in the text box and click this button to add the selection.
Add Other Choice Type	Click this button to add an answer choice for "Other." Respondents can type a choice that is not listed and select it as their answer.
Add Comment Choice Type	Click this button to add a text box for the respondent to type comments.
Move Down	Click this button to move an answer down one position.
Delete	Click this button to delete an option.

11. Click Next >. Your question is now saved.

12. To return to the Questions page, click Finish; to create another question, click Create Another Question (see Figure 5-9, "Creating Question Wizard—Finish," on page 5-11).

Creating a Text Question

This type of question is not actually a question, but rather a formatting feature that can be used to add text or graphics between survey questions. Text blocks can be used to break up a long series of questions, to give instructions for upcoming questions, or to add design features to a survey.

The following is an example of a text block question using the Email Link or Email HTML distribution method.

> The next six questions pertain to your internet shopping habits over the past year.

The following is an example of a text block question using the Email distribution method.

```
The next six questions pertain to your internet shopping habits
over the past year.
```

To create a text question:

1. Click **Create Question** to open the Creating Question wizard. (See Figure 5-4, "Creating Question Wizard—Enter Question Name," on page 5-8.)
2. Type the name of the question as it will appear throughout RightNow Metrics and click **Next >**. Choose a name that is unique and be as specific as possible.
3. Select the Text radio button and click **Next >** (see Figure 5-5, "Creating Question Wizard—Select Question Type," on page 5-9).
4. Type the actual question text that will be displayed in the survey (see Figure 5-6, "Creating Question Wizard—Enter Question Text," on page 5-9).

   Note: You can use HTML code in this field to format text and add graphics in the email link and email HTML surveys only. When sending a survey by email link and email HTML, you cannot use special characters in the text of your question unless you use HTML to format those characters.
5. To spell check the question, click **Spell Check**. For more information on this feature, refer to "Using Spell Check" on page 4-46.
6. Click **Next >**.

Path: Questions> Create Question

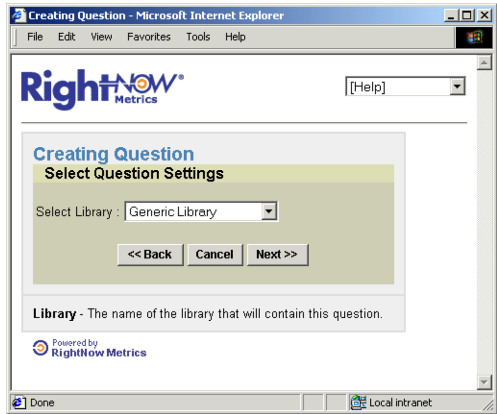


Figure 5-13: Creating Question Wizard—Select Question Settings

7. Select the library you want to store the question in and click Next >. Your question is now saved.

8. To return to the Questions page, click Finish; to create another question, click Create Another Question (see Figure 5-9, “Creating Question Wizard—Finish,” on page 5-11).

Creating Spaces

Like the text question type, the spaces question is not a question, but rather a formatting feature. Spaces can be used to insert a certain number of carriage returns (or
 tags in HTML) between your questions. You may want to use this feature to create a break in your survey, or to space out your questions to meet your style needs.

New

The following is an example of a survey both with and without custom spacing between questions. Note the difference in the amount of spacing between questions.

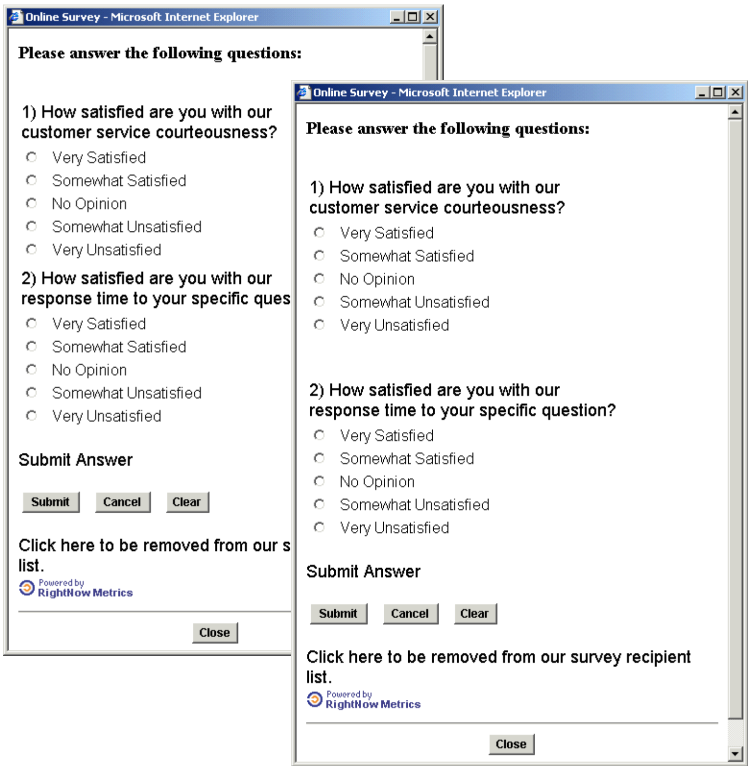


Figure 5-14: Survey Example With and Without Spaces

To create a text question:

1. Click **Create Question** to open the Creating Question wizard. (See Figure 5-4, "Creating Question Wizard—Enter Question Name," on page 5-8.)
2. Type the name of the question as it will appear throughout RightNow Metrics and click Next >. Choose a name that is unique and be as specific as possible.
3. Select the Space(s) radio button and click Next > (see Figure 5-5, "Creating Question Wizard—Select Question Type," on page 5-9).

Path: Questions> Create Question

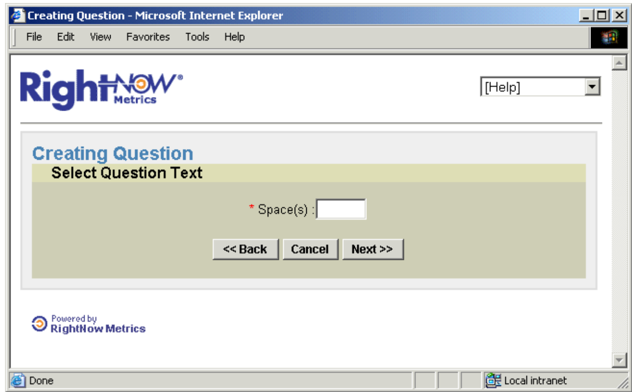


Figure 5-15: Creating Question Wizard—Select Question Text

4. Type the number of spaces this question will create in a survey and click Next >.

5. Select the library you want to store the question in (see Figure 5-13, “Creating Question Wizard—Select Question Settings,” on page 5-22) and click Next >. Your question is now saved.

6. To return to the Questions page, click Finish; to create another question, click Create Another Question (see Figure 5-9, “Creating Question Wizard—Finish,” on page 5-11).

Editing and Deleting Questions

RightNow Metrics makes it easy to modify questions, including copying questions to create new questions. It is important to remember that when you make a change to a question, the change will take effect in each survey that has not been launched that contains the question, but will not affect launched surveys that contain the question.

To edit a question:

1. From the Questions page select Edit from the Action drop-down menu next to the appropriate question and click Go.

Path: Questions>Edit

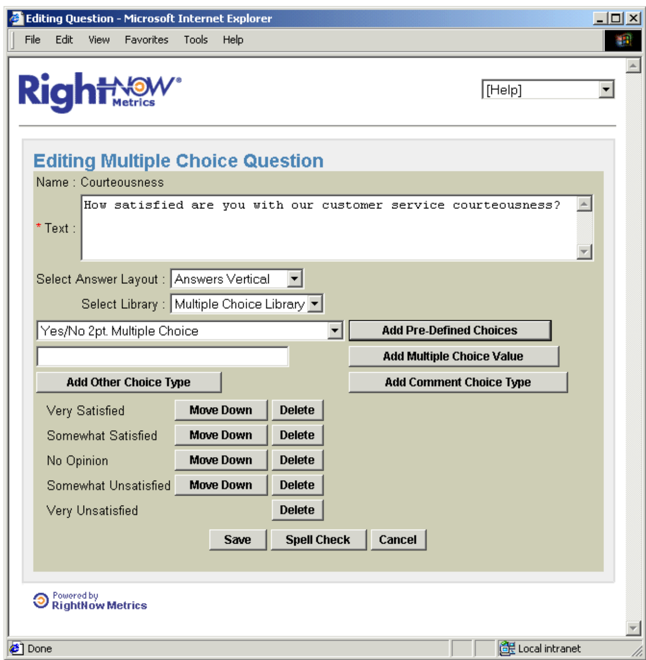


Figure 5-16: Editing Question Page

2. Edit the question as needed.

Note: When editing multiple choice and range questions, if you modify an answer choice used in a branching survey that has not been launched, those branches will be deleted. For complete information on editing questions and how it may affect surveys that contain branches, refer to “Editing a Survey Layout” on page 4-23.

3. To terminate the operation and revert to the original version of the question, click Cancel at any time.

4. Click Save to save your changes and return to the Questions page.

To copy a question:

1. From the Questions page select Copy from the Action drop-down menu next to the appropriate question and click Go. This will open the Copying Question page.

Path: Questions>Copy

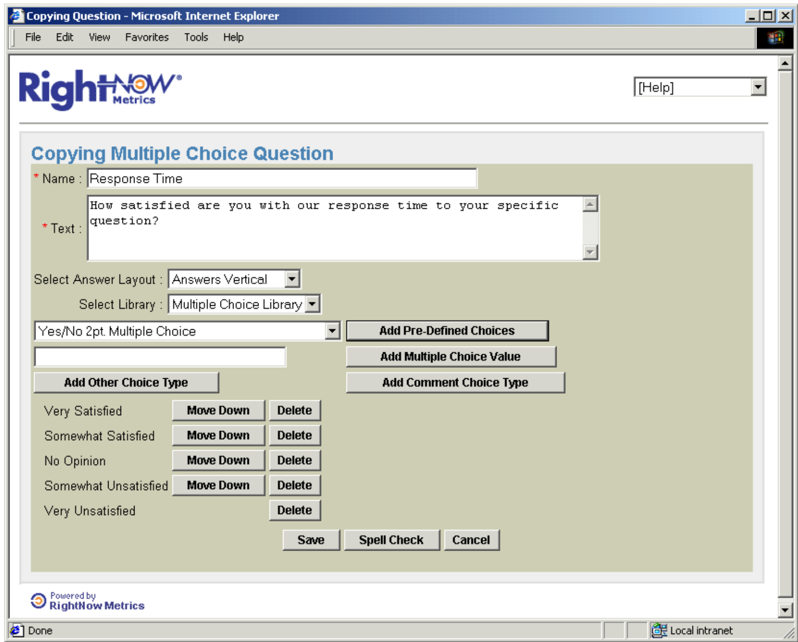


Figure 5-17: Copying Question Page

2. Type the new question name in the Name field. The copy function duplicates the question type, text, and answer choices.

3. Select a library to store the new question in from the Select Library drop-down menu.

4. To spell check the question, click Spell Check. For more information on this feature, refer to “Using Spell Check” on page 4-46.

5. Click Save to save the new question and return to the Questions page.

To preview a question:

1. From the Questions page select Preview from the Action drop-down menu next to the appropriate question and click Go. This will open the Question Preview page.

Path: Questions>Preview

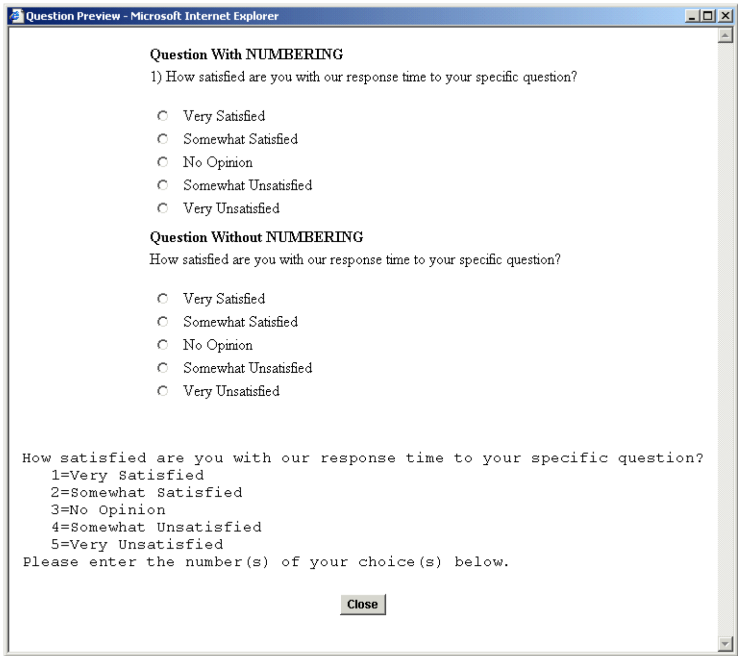


Figure 5-18: Question Preview

2. Click Close to close the preview window and return to the Questions page.

To delete a question:

1. Select Delete from the Action drop-down menu next to the appropriate question and click Go.

2. Click OK on the pop-up message to delete the question.

Active Surveys

Active Surveys is the central location for monitoring, viewing, and modifying your active surveys. Through this console, you can view the details about each active survey, including the number of surveys sent and received and percent of responses received. Some of the actions you can perform through Active Surveys include previewing, copying, and deleting surveys. You can also change survey settings where you can change the survey status, change the headers and trailers, change the reply mailbox, and select a notification rule for sending email notifications. Active surveys also enables you to score a survey or score a question in a survey and use this function to generate email notifications to staff members or managers to alert them if a score is particularly low or high.

If RightNow Metrics is integrated with RightNow eService Center, you can send surveys to your customers based on the type of incident they submit. From Active Surveys, you can also send more On-Demand surveys and manually enter survey responses.

From each active survey, you can instantly view the results in graphical or tabular format. You can then easily export data into other programs for further analysis or post or email the graphical results. You can also track the email addresses of persons that were sent surveys and those who responded. For information about survey results and reporting, refer to Chapter 7, “Results.”

After you begin to run multiple surveys simultaneously, you will want to observe your overall usage of RightNow Metrics to evaluate the load on your mail servers. To help you monitor usage, RightNow Metrics maintains current usage statistics for the total number of surveys sent and responses received. These statistics enable you and your system administrator to optimize server performance in relation to the current load. For more information on this feature, refer to Chapter 7, “Results.”.

This chapter describes the actions you can perform from Active Surveys and the pages accessible through this console.

Key Terms

As you begin to work with your active surveys, you will encounter new terminology and features unique to the Active Surveys console. For terminology not listed in this section, refer to the Glossary.

Email notification—An email alert sent to specified staff members as the result of a notification rule.

Notification Console—A console used for creating and modifying email notifications.

Notification rule—A rule that defines under what criteria an email notification will be sent to staff members. Rules can be used with the scoring feature to notify staff members when an overall survey score or individual question score is unusually high or low. Rules can also be used to notify staff members when there are problems with the network, server, mailbox, or password when sending or receiving surveys.

Scoring—A function that enables you to create a scoring system for a survey where each answer choice for a question has a corresponding score. You can use this information to generate total scores and percentages for surveys. You can also send email notifications if the score for a question or the overall survey score is unusually high or low.

Sending rule—Rules that enable you to send specific Closed-Incident surveys in relation to the CRM incident that triggers the survey.

Navigating Active Surveys

The Active Surveys console displays all of the surveys that have been launched. Each active survey includes the date launched, the date the last response was received, the number of survey responses that have been received, and the response rate. When responses to a survey have been received, a **Results** button is displayed to the right of the survey.

From this console, you can perform the following functions:

- **View details of all or individual Closed-Incident or On-Demand surveys**—You can click Closed-Incident Surveys or On-Demand Surveys to view the details of all surveys of this type or click survey name to view the individual survey. Refer to “Survey Details” on page 6-6.
- **Create a survey**—You can easily create a survey using the Creating Survey wizard. Refer to Chapter 3, “Creating Surveys.”
- **View usage statistics**—You can view the total number of surveys sent and received and export the statistics to another program for further analysis. Refer to “Viewing Usage Statistics” on page 7-27.
- **View survey results**—You can view survey results n graphical or tabular formats, export the results in CSV (comma separated value) format or PDF (portable document format) format, and view the list of email addresses sent surveys, list of responders, scoring results, or view results of a customized report. Refer to Chapter 7, “Results.”

Path: Metrics Login>Active Surveys

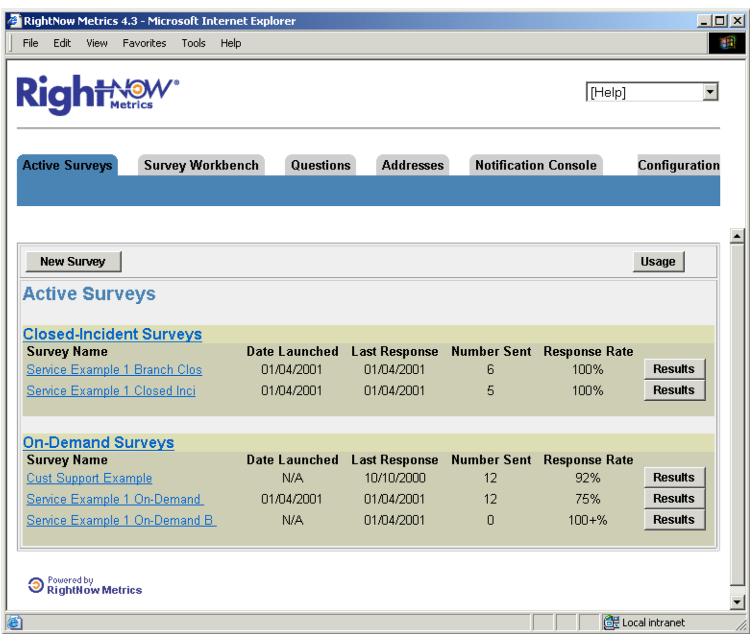


Figure 6-1: Active Surveys Page

Note: The Active Surveys page shown throughout this chapter displays both Closed-Incident and On-Demand surveys where RightNow Metrics has been integrated with RightNow eService Center. When RightNow Metrics is installed in standalone mode (not integrated with a CRM package), only On-Demand surveys can be sent and will be viewed on the Active Surveys page. For more information on integration, refer to Chapter 10, “Integration.”

Table 6-1 describes the fields and buttons on the Active Surveys page.

Table 6-1: Active Surveys Page Field Descriptions

Field/Button	Descriptions
New Survey	Click this button to create a new survey. This will launch the Creating Survey wizard. Refer to Chapter 3, “Creating Surveys” for instructions on creating a survey.
Usage	Click this button to view the usage statistics for RightNow Metrics, including the number of surveys sent and the number of responses received. For more information on usage, refer to “Viewing Usage Statistics” on page 7-27.
Closed-Incident Surveys	Click this link to view the details of all Closed-Incident surveys. For more information, refer to “Survey Details” on page 6-6.
On-Demand Surveys	Click this link to view the details of all On-Demand surveys. For more information, refer to “Survey Details” on page 6-6.
Survey Name Link	Click this link to view the details of the individual survey. For more information, refer to “Survey Details” on page 6-6.
Date Launched	The column displays the date the survey was launched. **Note:** This date may or may not correspond with the date when the first survey was actually sent. Several factors can affect this date, including the survey scheduling, whether you sent surveys when you initially launched the survey, and whether the survey is a Closed-Incident survey where the first survey is sent only when a trigger email is received from your CRM software.
Last Response	This column displays the date the last response was received. This information can help you decide when to halt a survey.
Number Sent	This column displays the total number of surveys sent, including the surveys sent when the survey was originally launched and any additional surveys sent.
Response Rate	This column displays the percent of survey responses received for the number of surveys sent.

Table 6-1: Active Surveys Page Field Descriptions (Continued)

Field/Button	Descriptions
	Click this link to open the Survey Results page to view the results of the individual survey. For information, refer to Chapter 7, “Results.” **Note:** This button appears only when survey responses have been received.
	Click the Help drop-down menu to select one of the following: Help On This Page, Help Contents, About Metrics, or Other Resources.

Survey Details

You can view the details of each survey through the Survey Details page. This page displays the survey name, number of surveys sent, number and percent of responses received, activation date, date when the last response was received, whether or not scoring and notifications are enabled, survey tracking and distribution information, and the survey status.

From Active Surveys, you can access three types of survey details: all On-Demand surveys, all Closed-Incident surveys, and individual surveys.

To view survey details:

1. To view all On-Demand surveys, click On-Demand Surveys.
2. To view all Closed-Incident surveys, click Closed-Incident Surveys.
3. To view the details of an individual survey, click the survey name.

Figure 6-2 displays the Survey Details page for all On-Demand surveys.

Path: Active Surveys>On-Demand Surveys

Figure 6-2: Survey Details Page—On-Demand Surveys

Notice that each survey is displayed in a horizontal block, which makes it easy to view individual survey details. All surveys that have been launched are listed, excluding those surveys that have been deleted. This includes all On-Demand surveys in Receiving and Halted status. (Statuses for Closed-Incident surveys include Sending and Receiving, Receiving, and Halted. For information about survey status, refer to Chapter 4, “Survey Workbench.”)

Table 6-2 describes the fields and buttons on the Survey Details page. .

Table 6-2: Survey Details Page Descriptions

Field/Button	Description
	Click this button to invoke the Creating Survey Wizard and create a new survey. Refer to Chapter 3, “Creating Surveys.”
	Click this drop-down menu to select a report to view. The reports include Results, Participants URL Links (for Web surveys only), and Customize Graphical Report.Refer to “Results” on page 7-1.
	Click this button to view the selected report.
	Click this drop-down menu to select an action. You can preview a survey, change the settings, copy the survey, modify the scoring, specify the sending rules for Closed-Incident survey, send more On-Demand surveys, and delete a survey. Refer to “Modifying Active Surveys” on page 6-10.
Preview	Select Preview to open a new Web browser displaying the survey as it will look either as a Web page, series of Web pages, or as an email, depending on the distribution method. Refer to “Previewing a Survey” on page 6-11.
Change Settings	Select Change Settings to change the survey settings, including the survey type, distribution method, tracking method, schedule, email addresses, settings, style, and email settings. Refer to “Changing Survey Settings” on page 6-14.
Copy	Select Copy to copy the questions and layout of an existing survey to a new survey. Refer to “Copying a Survey” on page 6-14. **Note:** The copy feature does not copy survey settings that are specified as part of the launching process or after a survey is launched, including the scoring, sending rules, or survey characteristics.
Scoring	Select Scoring to specify a point ranking for each question to calculate a total score for the survey. You can also have email notifications sent if a question score or a survey total is unusually high or low. Refer to “Scoring a Survey” on page 6-21.
*Sending Rules	Select Sending Rules to specify the rules for sending Closed-Incident surveys. Closed-Incident surveys are activated by a trigger email sent by RightNow eService Center or another CRM package and correspond to an incident. You can create rules that will send specific Closed-Incident surveys determined by corresponding data from the eService Center or CRM incident. Refer to “Applying Sending Rules to Closed-Incident Surveys” on page 6-32.

Table 6-2: Survey Details Page Descriptions (Continued)

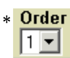
Field/Button	Description
**Send More	Select Send More to send additional On-Demand surveys after you have launched a survey. Refer to "Sending More On-Demand Surveys" on page 6-38.
**Enter Data	Select Enter Data to add survey responses to an On-Demand survey. This feature allows you to enter survey responses from sources outside RightNow Metrics, such as a telephone or mail survey. Refer to "Sending More On-Demand Surveys" on page 6-38.
Delete	Select Delete to delete a survey that is no longer needed. **Caution!** Deleting a survey will permanently remove the survey from the database and all results from the survey.
	Click this button to perform the selected action.
* 	Click this drop-down menu to select the survey order. This order determines the sequence of the sending rules for Closed-Incident surveys. The sending rules for the survey with an order of 1 will be the first set of rules read, followed by the sending rules of survey with an order of 2. For more information on sending rules, refer to "Applying Sending Rules to Closed-Incident Surveys" on page 6-32.
Number Sent	This field shows the total number of surveys sent.
Number Received	This field shows the total number of survey responses that have been received.
**Percent Received	This field shows the number of survey responses received as a percentage of the total number sent.
Activation Date	This column displays the date the survey was launched. **Note:** This date may or may not correspond with the date when the first survey was actually sent. Several factors can affect this date, including the survey scheduling, whether you sent surveys when you initially launched the survey, and whether the survey is a Closed-Incident survey where the first survey is sent only when a trigger email is received from your CRM software.
Last Received Date	This column displays the date the last response was received. This information can help you decide when to halt a survey.
Scoring Enabled	This field indicates whether or not the scoring feature is enabled. For information, refer to "Scoring a Survey" on page 6-21.
Notifications Enabled	This field indicates whether or not the notifications feature is enabled. For information, refer to "Notification Rules" on page 6-24.
***Survey Tracking	This column displays the tracking method for a survey, including targeted and anonymous.For information on targeted and anonymous tracking methods, refer to Chapter 3, "Creating Surveys."

Table 6-2: Survey Details Page Descriptions (Continued)

Field/Button	Description
Distribution	This column displays the distribution method for the survey. The distribution methods include Email Link, Email HTML, and Email. Refer to “Determine the Distribution Method” on page 3-5 for a description of each method.
Status	This column displays the current status of the survey. Options include Sending and Receiving, Receiving, and Halted.

*The field is available only for Closed-Incident surveys.
**The field is available only for On-Demand surveys.
***This field is available only for On-Demand surveys using either the Email Link or Email HTML distribution methods.

Modifying Active Surveys

In addition to viewing survey details from the Survey Details page, you can perform a variety of tasks to modify your launched surveys.

Basic options include:

- **Previewing a survey**—You can use the preview feature to view the design and formatting of all pages in a survey. Refer to “Previewing a Survey” on page 6-11.
- **Copying a survey**—You can create a new survey by copying an existing survey. Refer to “Copying a Survey” on page 6-14.
- **Deleting a survey**—You can permanently delete a survey that has been launched. Refer to “Deleting a Survey” on page 6-14.

More advanced options include:

- **Changing survey settings**—You can change certain settings for launched surveys depending on the type of survey and method of distribution. Refer to “Changing Survey Settings” on page 6-14.
- **Creating a scoring system**—RightNow Metrics provides a scoring function to generate an overall score for launched surveys. Refer to “Scoring a Survey” on page 6-21.
- **Creating and applying notification rules**—You can create notification rules to notify staff members if survey scores are unusually high or low, or if there is a error with sending or receiving surveys. Refer to “Notification Rules” on page 6-24.

Options specific to Closed-Incident surveys include:

- **Specifying sending rules**—The sending rules feature in RightNow Metrics allows you to send Closed-Incident surveys that are specific to the type of eService Center incident or CRM ticket that customers submit to your organization.“Applying Sending Rules to Closed-Incident Surveys” on page 6-32.

Options specific to On-Demand surveys include:

- **Sending additional surveys**—You can send additional On-Demand surveys at any time using the Send More function in RightNow Metrics. “Sending More On-Demand Surveys” on page 6-38.
- **Entering data to add survey responses**—The Enter Data feature enables you to manually input survey responses into the results of a survey. “Manually Entering Survey Responses” on page 6-41.

The following sections provide more information about modifying your active surveys. For information on survey results, refer to Chapter 7, “Results.”

Previewing a Survey

You can view the design and formatting of all pages in a survey using the preview feature. This feature allows you to easily see the survey after it has been launched. (You can also preview surveys before launching them. Refer to Chapter 4, “Survey Workbench” for details.)

Using the preview feature, the pages of a multiple page Web-based surveys (such as surveys using Email Link and Email HTML distribution methods) are displayed in sequence on one page. The bottom of each page contains Submit and Clear buttons, the RightNow Metrics logo, and a line below the logo. (The buttons, logo, and line appear by default, but can be changed in the HTML bottom field of the survey settings. For more information, refer to “Changing Survey Settings” on page 6-14.)

When a survey participant responds to a multiple-page Web-based survey, each page will display individually. When the participant answers the questions on a page and clicks Submit, the answers will be submitted and the next page will load. This will continue until all pages have been displayed, depending on the survey layout and branching.

When a survey participant responds to a single-page Web-based survey, all the questions will appear on one page. When the participant answers all of the questions and clicks Submit, all of the answers will be submitted together.

Note: You can change the text on the Submit button or any button that appears on a survey. You can change button text on each page of a survey or just a single page. See step 4 on page 4-15 for specific instructions.

New

To preview a survey:

1. From the Active Surveys page, click the survey name you want to preview. This opens the Survey Details page.
2. Select Preview from the Actions drop-down menu and click Go. Figure 6-3 and Figure 6-4 show survey previews for single- and multiple-page, Web-based surveys.

Path: Active Surveys>survey name>Preview

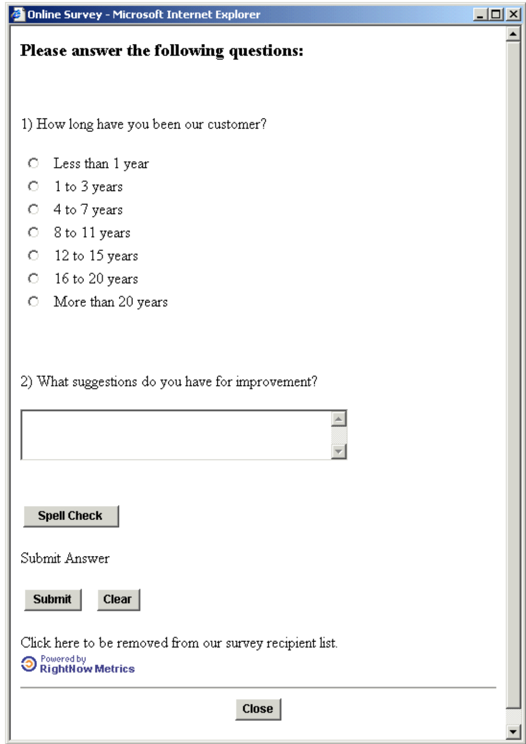


Figure 6-3: Preview Survey Page—Single-Page, Web-Based Survey

***Path:* Active Surveys>survey name>Preview**

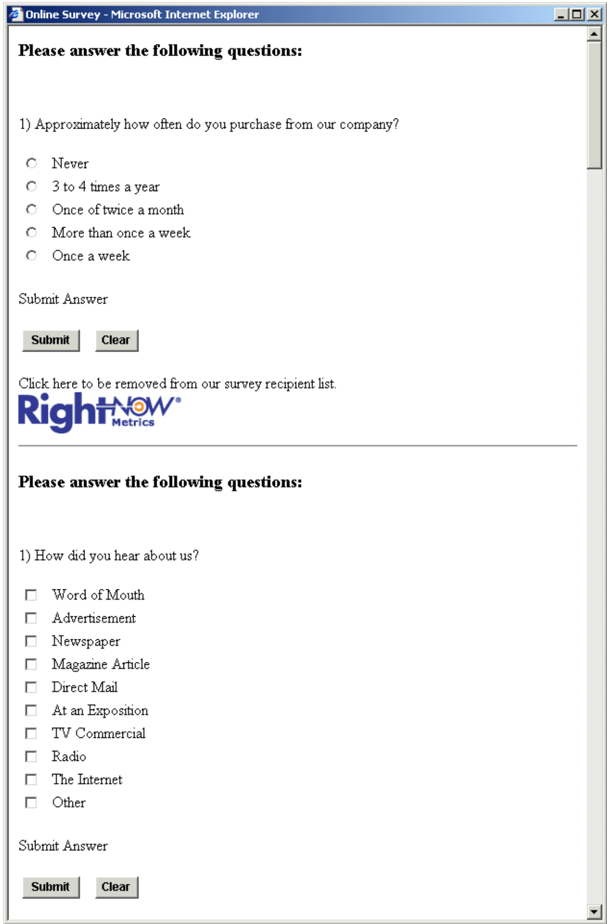


Figure 6-4: Preview Survey Page—Multiple-Page, Web-Based Survey

3. To return to the Survey Details page, click Close.

Copying a Survey

You can create a new survey by copying an existing survey. This is beneficial if you want to create a survey that is similar to an existing one, but with a few modifications. When you copy a survey, all of the settings and survey questions and layout are copied. You will only need to add a new survey name.

Note: The copy feature does not copy certain settings that are specified during the launching process or after a survey has been launched, including scoring and sending rules.

To copy an existing survey:

1. Click the survey name to open the Survey Details page.
2. Select Copy from the Actions drop-down menu and click Go.
3. Type the name of the new survey in the Survey Name field.
4. Click Save to save the new survey.

Deleting a Survey

You can permanently delete a survey that has been launched. Deleting a launched survey will also permanently delete all results of the survey.

To delete a survey:

1. Click the survey name you want to delete to open the Survey Details page.
2. Select Delete from the Actions drop-down menu and click Go.

Changing Survey Settings

You can change certain settings for launched surveys depending on the type of survey and method of distribution. You can make adjustments to the survey status, the percentage of surveys to mail, or the reply mailbox for Closed-Incident surveys.

New

New to this version of RightNow Metrics is the ability to select notification rules from the survey settings page. This feature allows you to send an email notification to staff members to check for errors with the network, server, mailbox, or password when sending or receiving surveys. For more information, refer to "Notification Rules for Error Checking" on page 6-32.

Note: For RightNow Metrics to compile survey results, many of the settings for On-Demand surveys cannot be changed after the survey has been launched.

To change survey settings:

1. Click the survey name to open the Survey Details page.
2. Select Change Settings from the Actions drop-down menu and click Go. Figure 6-5 displays the Survey Settings page for a Closed-Incident survey. Figure 6-6 displays the Survey Settings page for an On-Demand survey.

Path: Active Surveys>survey name>Change Settings

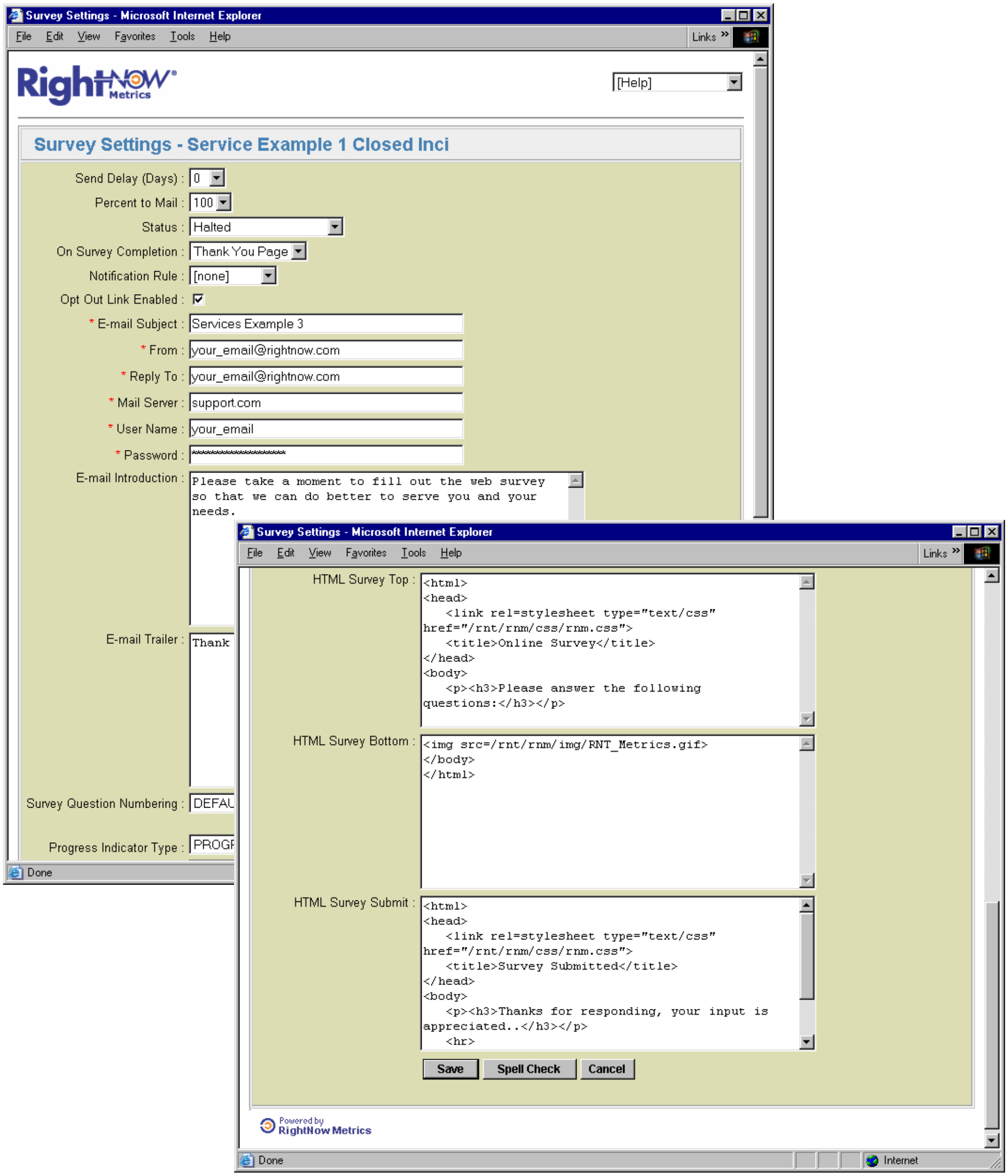


Figure 6-5: Survey Settings Page—Closed-Incident Survey

Path: Active Surveys>survey name>Change Settings

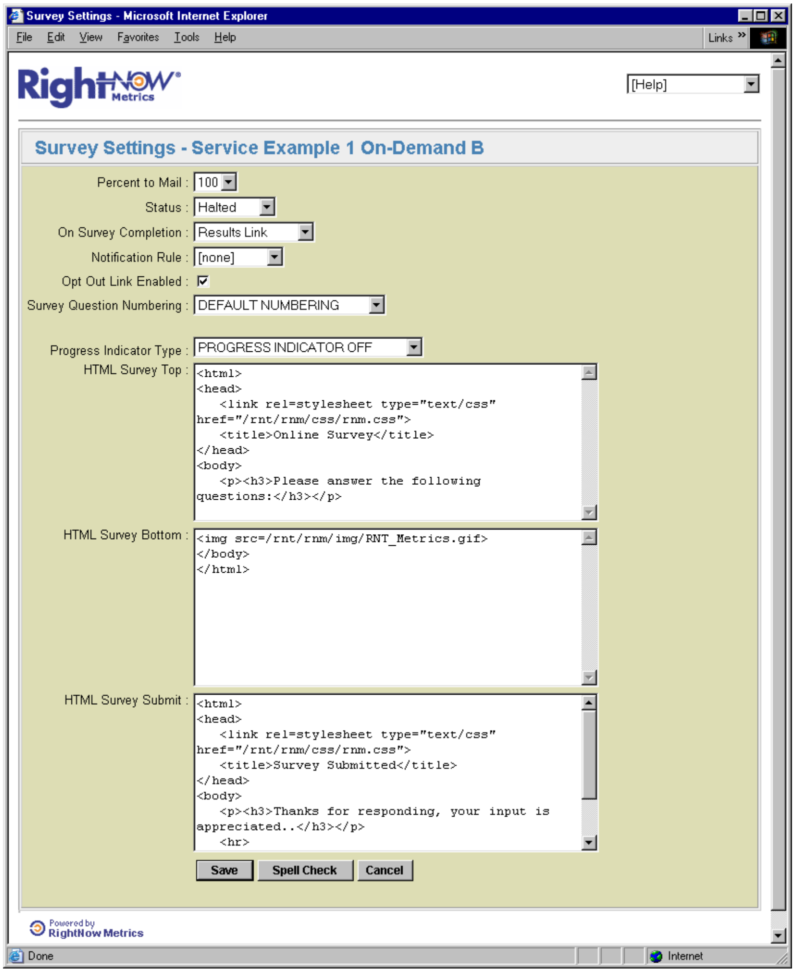


Figure 6-6: Survey Setting Page—On-Demand Survey

3. Edit field information as necessary. Refer to Table 6-3, "Survey Settings Page Field Descriptions," on page 6-17 for a description of each field and button on the page.

4. To the fields, click Spell Check. For information on the spell check feature, refer to "Using Spell Check" on page 4-46.

5. Click Save to save your changes and return to the Survey Details page.

Table 6-3: Survey Settings Page Field Descriptions

Field/Button	Description
*Send Delay (Days) : 0	Click this drop-down menu to select the number of days to delay the sending of the Closed-Incident surveys after the trigger email has been received by RightNow Metrics. This setting is based on the next occurrence of 12:01 A.M. and the next scheduled time that the *pollster* utility will run as set in your system's cron (UNIX) or Task Scheduler (Windows). (Click here for more information about the *pollster* utility, or refer to the *RightNow Metrics 4.3 Installation Guide*.) The survey will be sent the first scheduled time *pollster* runs after the first occurrence of 12:01 A.M. For example, if the trigger email is received at 6:00 P.M., the survey will be sent 6 hours later at 12:01 A.M.
Percent to Mail : 100	Click this drop-down menu to select the percentage of surveys to send. A random number generator returns a send / no-send signal based on the specified percentage for each email address in the list or for each trigger email received. For example, if a list of 100 email addresses is used for an On-Demand survey with a percent to mail of 10%, the random generator determines whether or not a survey will be sent for each address. In effect, there will be only a 10% chance that a survey will be sent to any single email address. Of the 100 email addresses used, approximately 10 will actually be sent surveys.
Status : Sending and Receiving	Click this drop-down menu to select the survey status. This determines if more surveys will be sent and if responses will be accepted for a survey. The statuses include Sending and Receiving, Receiving, or Halted.
*Sending and Receiving	Select this status to allow surveys to be sent and received. Choose this setting for an on-going Closed-Incident survey.
Receiving	Select this status to allow survey responses to be received. This status will restrict any more surveys from being sent. Choose this status for an on-going On-Demand survey and when you want to end a Closed-Incident survey, but you do not want to restrict people from submitting responses.
Halted	Select this status to restrict both the sending of more surveys and the receiving of more survey responses. Choose this status when you want to terminate an On-Demand or Closed-Incident survey, but still want access to the survey results.
On Survey Completion : Thank You Page	Click this drop-down menu to select what the participant will see when they finish submitting their responses to a survey, including Thank You Page, Results Page, or Results Link.
Thank You Page	Select this option to send participants to a Web page thanking them for their participation after they have submitted their survey.

Table 6-3: Survey Settings Page Field Descriptions (Continued)

Field/Button	Description
Results Page	Select this option to send participants directly to a Web page containing the survey results.
Results Link	Select this option to give participants a link to a Web page containing the survey results.
Notification Rule	Click this drop-down menu to select a notification rule to apply to this survey. Notification rules define the criteria necessary for an email notification to be sent to a staff member. Notification rules can be set up so that staff members are notified when an overall survey score or individual question is unusually high or low or when a multiple choice or range type question receives a specific answer.
*Opt Out Link Enabled	Select this check box to allow an opt out link for the responder. This will allow the responder to exempt themselves from future surveys.
*Email Subject	Type the text you want in the subject line of the email message sent to the participants that contains the survey or a link to the survey.
*From	Type the email address to appear in the From field of the email. This field must contain a valid email address. To display only a name in the From field, type the person’s name followed by a valid email address in brackets, in the following format: **Jerry Gomez <jgomez@company.com>** Most email clients will display this name as the sender of the message.

Table 6-3: Survey Settings Page Field Descriptions (Continued)

Field/Button	Description
*Reply To	**On-Demand surveys:** For Email Link distribution, type a valid email address. This setting is used to meet POP3 protocol only and is not used otherwise. For Email HTML distribution, type the email address of the mailbox to be used to collect survey responses. This email address will only be used to meet POP3 protocol if the survey recipient responds to the survey via the survey link. For Email distribution, type the email address of the mailbox to be used to collect survey responses. **Closed-Incident surveys:** For all distribution methods, your CRM software must be configured to send trigger emails to this address. For RightNow eService Center, this email address is specified in the following configuration setting: **RNW Common>Modules>RightNow Metrics Integration> RNM_E-MAIL_INTERFACE** For Email Link distribution, type the email address of the mailbox used to collect trigger emails from your CRM software. The pollster utility will access this mailbox to parse the incoming mail for trigger emails. For Email HTML distribution, type the email address of the mailbox used to collect survey responses (if the recipient responds by replying to the email) and trigger emails from your CRM software. The pollster utility will access this mailbox to parse the incoming mail for survey responses and trigger emails. For Email distribution, type the email address of the mailbox used to collect survey responses and trigger emails from your CRM software. The *pollster* utility will access this mailbox to parse the incoming mail for survey responses and trigger emails. **Note:** This field is available on the Survey Settings page for Closed-Incident surveys only.
*Mail Server	Type the name of the mail server to be used to gather incoming survey mail. This is the mail server of the Reply To email address. This is usually in the form "servername.domain.com." Some email programs are configured to automatically download email messages off the mail server onto a user's local machine. If you access this mailbox with a client configured in this fashion, the *pollster* utility will not be able to access survey responses or trigger emails.
*User Name	Type the user name of the mailbox to be used to receive email for this survey. **Note:** This mailbox should be dedicated to receiving RightNow Metrics email messages. Mail in this box will be automatically read and deleted.
*Password	Type the password for the Reply To mailbox. The *pollster* utility uses this password to access the survey responses and trigger emails from this mailbox. **Note:** You do not have to re-enter the password when changing survey settings; however, the asterisks must be shown.

Table 6-3: Survey Settings Page Field Descriptions (Continued)

Field/Button	Description
*Email Introduction	Type the text that you want to display in the email above the survey link or survey text depending on the survey distribution method. This can be in text or HTML format.
*Email Trailer	Type the text that you want to display in the email below the survey link or survey text depending on the survey distribution method. This can be in text or HTML format.
**Survey Question Numbering	The following options are available with this drop-down menu.
Default Numbering	The numbering for each page is 1.
Continuous Numbering	The numbering is continuous through the entire survey.
No Numbering	Page numbering is not included.
**Progress Indicator Type	The following options are available from this drop-down menu:
Progress Number Indicator	A number at the top of a survey page indicating what percentage of the survey the participant has completed.
Progress Indicator Off	The Progress Indicator is not displayed.
Progress Bar Indicator	A bar at the top of a survey page that graphically indicates how much of the survey has been completed by the participant.
HTML Survey Top	Using HTML code, type the text and add any graphics you want to display at the top of a survey sent via Email Link or Email HTML.
HTML Survey Bottom	Using HTML code, type the text and add any graphics you want to display at the bottom of a survey sent via Email Link or Email HTML.
HTML Survey Submit	Using HTML code, type the text and add any graphics you want to display on a new Web page after the participant has completed a survey and submitted their responses. This field applies to surveys using the Email Link or Email HTML distribution methods only. You can include a link to the Survey Results page using the variable RNMTAG_SURVEY_RESULTS, which specifies the URL of the Survey Results page. You can use this variable within a hyperlink tag in the following format: Text or image **Note:** The default is “Thank you for responding, your input is appreciated,” followed by the RightNow Metrics logo.

*This field is only available for Closed-Incident surveys.
**This field is only available for On-Demand surveys.

Scoring a Survey

RightNow Metrics provides a scoring function that enables you to create a scoring system for a survey where each answer choice for a question has a corresponding score. You can use this information to generate total scores and percentages for surveys. You can also send email notifications to staff members if the score for a question or the overall survey score is unusually high or low.

For example, if you have a survey consisting of 10 questions, you could assign each question a value of 5, making a total score of 50. As a participant answers a question, RightNow Metrics will score each response according to a predefined scale. You can then analyze the survey on a percentage basis by looking at the total score given by the participant in comparison to the total score available.

Note: Surveys must be launched for the scoring function to be available. The default score values of questions and surveys are set to 0.

This section contains procedures for editing score values for individual questions and survey results.

To edit score values:

1. Click the survey name you want to score.

2. Select Scoring from the Actions 8drop-down menu and click Go.

***Path:* Active Surveys>survey name>Scoring**

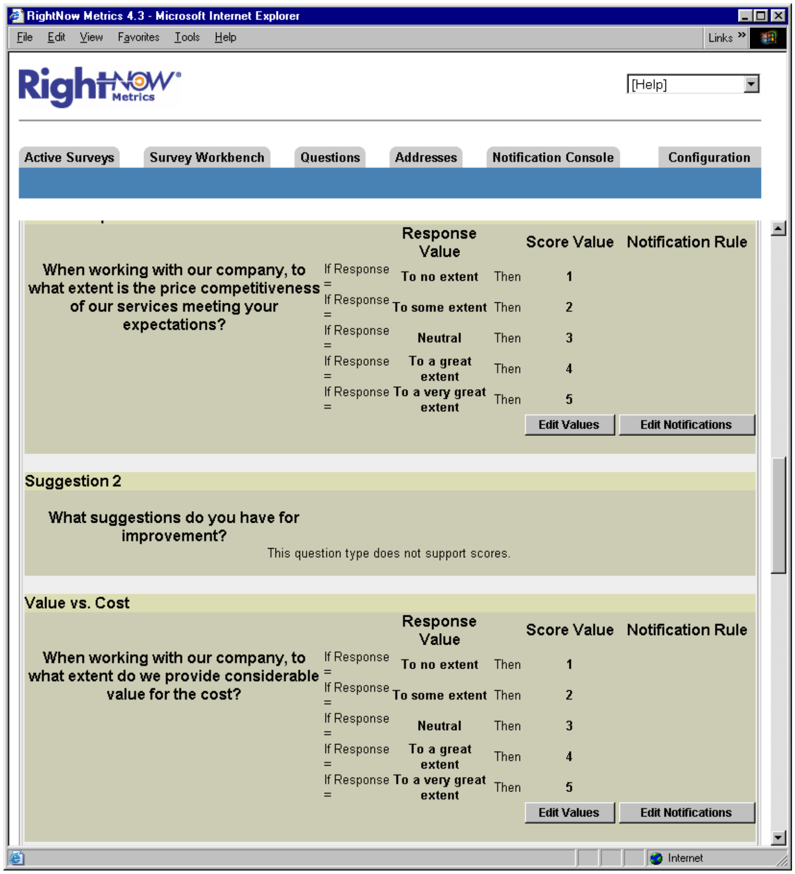


Figure 6-7: Score Console

3. Click **Edit Values** to open the Survey Scoring page.

***Path:* Active Surveys>survey name>Scoring>** Edit Values

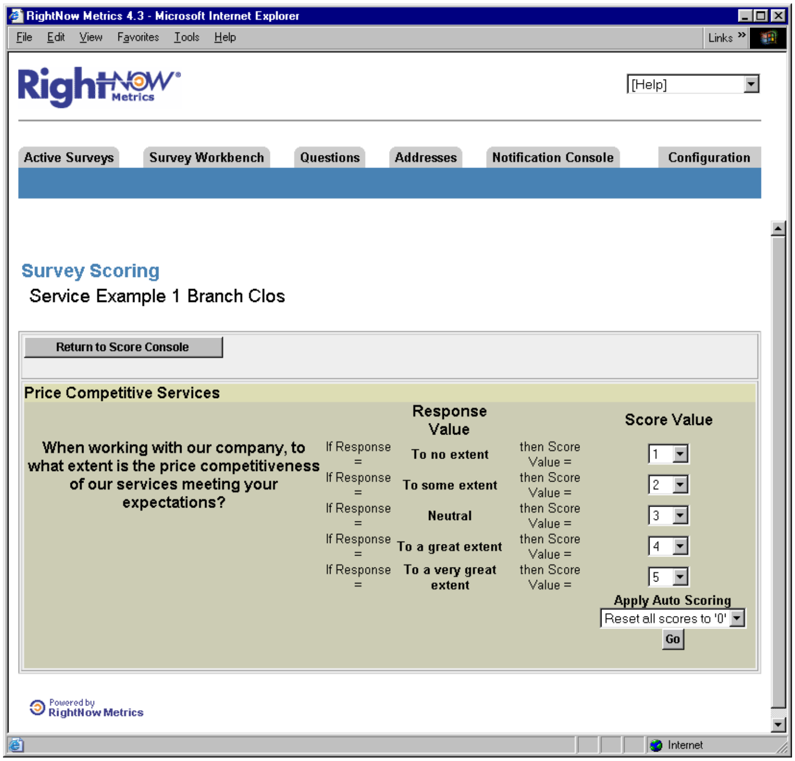


Figure 6-8: Survey Scoring Page

4. To assign each response a score between -10 and 10, select the number from the Score Value drop-down menu next to the question response. Refer to Table 6-4 for a description of the buttons, menus, and fields on the survey scoring pages.

5. To auto-score the responses, select Low to High or High to Low from the Apply Auto Scoring drop-down menu and click Go.

   Note: If you select High to Low, the first response listed will receive the highest value; if you select Low to High, the first response will have a value of 1. The remaining responses will be scored incrementally by 1.

6. To assign each response the value of 0, select Reset All Scores to ‘0’ from the Apply Auto Scoring drop-down menu and click Go.

7. Click Return to Score Console to save your changes and return to the Score Console.

Table 6-4: Survey Scoring Page Field Descriptions

Field/Button	Description
Edit Values	Click this button to assign or edit score values for the responses to a question.
0	Click this drop-down menu to manually select a score between -10 and 10 for the response.
Reset all scores to '0'	Click this drop-down menu to select one of the following: Reset All Scores to '0,' High to Low, or Low to High. • Select Reset All Scores to '0' to set each score value to 0. • Select Low to High to assign the first response the value of 1. The remaining responses will be set incrementally higher. • Select High to Low to assign the last response the value of 1 and the remaining responses incrementally higher.
Go	Click this button to perform the action selected in the Apply Auto Scoring drop-down menu.
Return to Score Console	Click this button to return to the Score Console.

Notification Rules

Notification rules define the criteria that will trigger an email notification to be sent to staff members. Notification rules can be set up so that staff members are notified when an overall survey score or individual question score is unusually high or low. For example, you could create a rule to send an email notification when a survey is less than, greater than, or equal to a certain score.

You can also set up a notification rule for multiple choice or range type questions to notify staff members if you receive a particular answer to a question. For example, you could create a notification rule to email your customer service manager when a customer replies "very unsatisfied" to a question regarding customer service. For more information on using notification rules with scoring surveys or survey questions, refer to "Notification Rules and Scoring" on page 6-25.

Note: We suggest setting up email notifications prior to creating notification rules. For information on setting up these notifications, refer to Chapter 9, "Notification Console."

New

You can also create a notification rule to alert staff members when there is a problem with the network, server, mailbox, or password settings when sending or receiving surveys. The staff member will receive a notification only when there is a communication problem. The notification will include a description of the problem. For procedures for creating this type of notification, refer to "Notification Rules for Error Checking" on page 6-32.

Notification Rules and Scoring

Notification rules provide a method to alert staff members when overall survey scores or individual survey question scores are unusually high or low. You can also set up a rule for a multiple choice or range type question if you receive a particular response. For example, if you have a survey question stating "How helpful were our customer service representative?' and the answer is "Not Helpful," you can use notification rules to send an email notification to a manager concerning that particular answer. Once a rule is applied, it will send out an email notification to the email recipient(s) listed in the notification.

Note: We strongly recommend creating your email notifications prior to creating notification rules. For information on creating email notifications, refer to Chapter 9, "Notification Console."

The following procedures apply if you have already created your email notifications through the Notification Console.

To create a notification rule for an individual question:

1. Click the survey name to open the Score Console.
2. Select [Scoring] from the Actions drop-down menu and click [Go].
3. Click [Edit Notifications] (see Figure 6-7, "Score Console," on page 6-22).

Path: Active Surveys>**__survey name__**>Scoring> Edit Notifications

Figure 6-9: Edit Notifications Page

4. Click the Notification Rule drop-down menu next to the response value and select the desired notification name.

5. Click Return to Score Console to save the notification rule and return to the Score Console.

To create a notification rule for an individual question if you do not have pre-existing email notifications:

1. Click the survey name to open the Score Console.

2. Select Scoring from the Actions drop-down menu and click Go.

3. Click Edit Notifications (see Figure 6-7, “Score Console,” on page 6-22).

Path: Active Surveys>survey name>Scoring> Edit Notifications

Figure 6-10: Edit Notifications Page

4. Click Notification Console to create the email notification.

Path: Active Surveys>survey name>Scoring> Edit Notifications > Notification Console

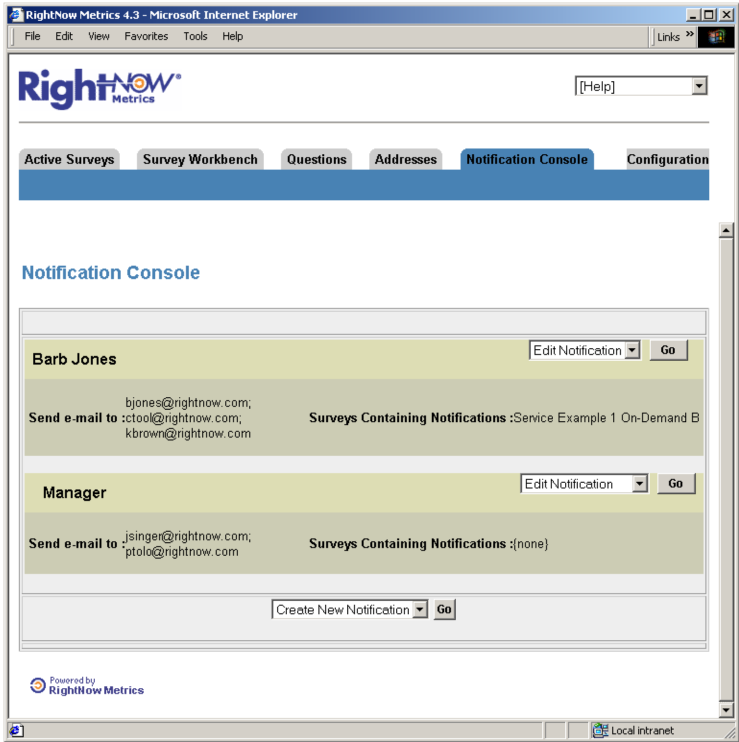


Figure 6-11: Notification Console

5. Select Create New Notification from the drop-down menu and click Go.

Path:* *Active Surveys>survey name>Scoring>* Edit Notifications *>* Notification Console *>* *Create New Notification

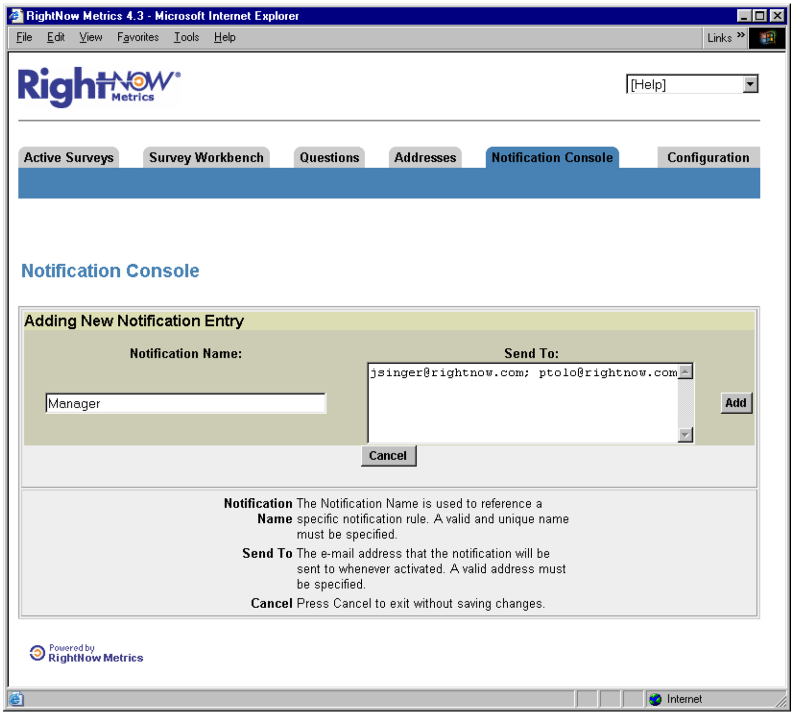


Figure 6-12: Notification Console–Creating an Email Notification

6. Type the name of the notification recipient(s) in the Notification Name field.

7. Type a valid email address or addresses for notification in the Send To field.

8. Click Add to save the notification recipient(s) and return to the Notification Console.

9. Click Active Surveys to return to the Active Surveys page. Click the survey name to open the Score Console.

10. Select Scoring from the Actions drop-down menu and click Go.

Path: Active Surveys>**survey name*****>Scoring>*** Edit Notifications

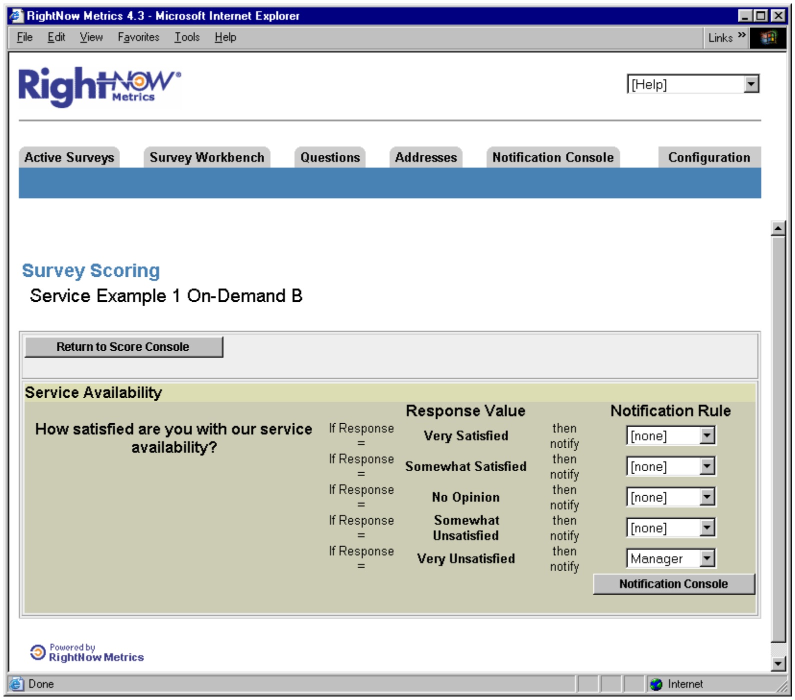


Figure 6-13: Survey Scoring Page

11. Click the Notification Rule drop-down menu next to the answer and select the desired notification name.

The notification recipient(s) will then receive a notification by email when a survey participant answers the question with the specified response. In Figure 6-13, the notification recipient, Manager, will be notified if any survey participant answers the question, "How satisfied are you with our service availability?" with the response, "Very Unsatisfied."

12. Click Return to Score Console to save the notification rule and return to the Score Console.

To create a notification rule for overall survey results:

1. Click the survey name.

2. Select Scoring from the Actions drop-down menu and click Go.

3. Click Edit Survey Result Rules (see Figure 6-7, "Score Console," on page 6-22).

***Path:* Active Surveys>survey name>Scoring>** Edit Survey Result Rules

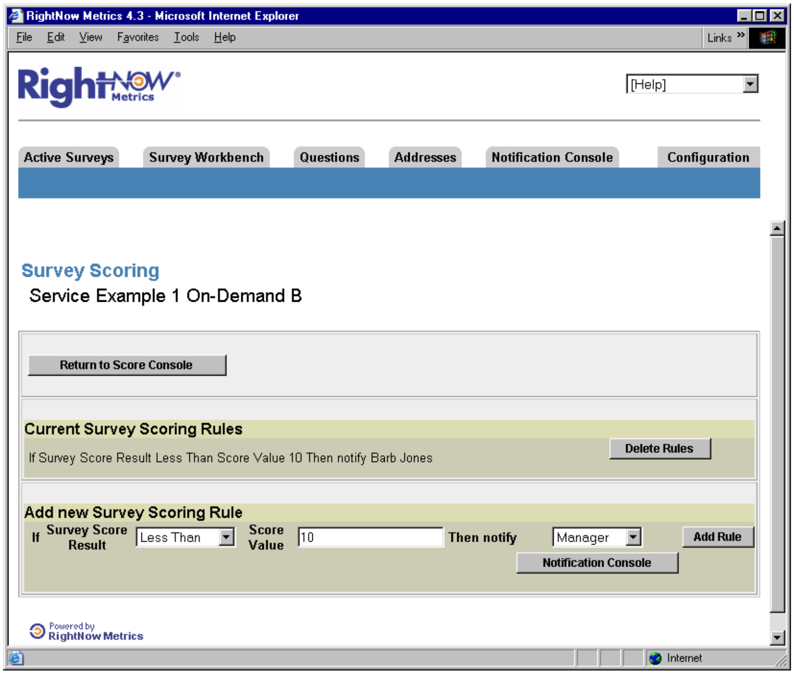


Figure 6-14: Survey Scoring Page—Result Rules

4. Enter the rule criteria and click Add Rule.

5. Click Return to Score Console.

The notification recipient will receive an email if the total survey score meets the assigned criteria. In the following example, the notification recipient, Manager, will receive an email if the total survey score is less than 10.

Path: Active Surveys>**survey name*****>Scoring***

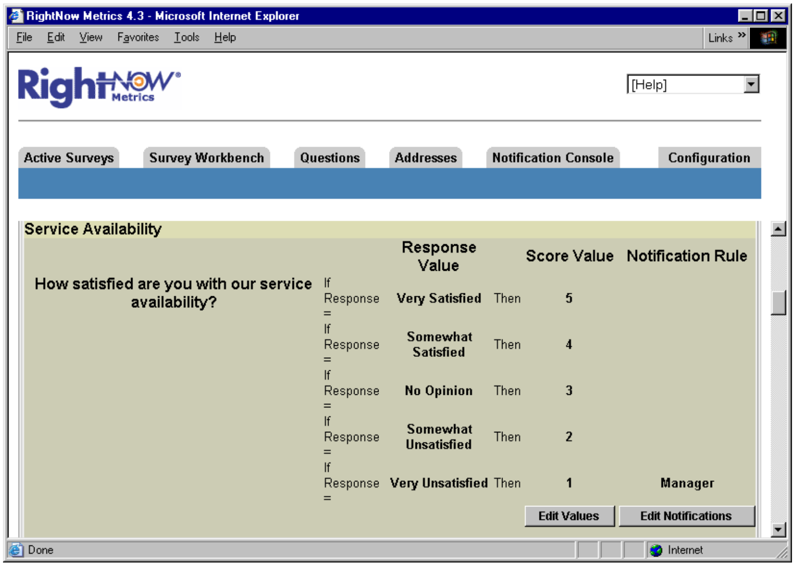


Figure 6-15: Score Console

6. Click **Active Surveys** to return to the Active Surveys page.

Notification Rules for Error Checking

New

You can also set up notification rules to notify staff members when there are problems with the network, server, mailbox, or password settings when sending or receiving surveys. This can be done either through the Launching Survey wizard or through the Change Settings feature for active surveys. Notifications will be sent only when there is a problem when sending or receiving surveys. For information on applying notification rules to active surveys, refer to “Changing Survey Settings” on page 6-14.

Note: For a description of the Notification Rule field, refer to “Survey Settings Page Field Descriptions” on page 6-17. For information about adding the rule through the Launching Survey wizard, refer to Chapter 4, “Survey Workbench.” For information on creating email notifications, refer to Chapter 9, “Notification Console.”

Applying Sending Rules to Closed-Incident Surveys

The sending rules feature in RightNow Metrics enables you to send Closed-Incident surveys that are specific to the nature and type of RightNow incidents or CRM tickets that customers submit to your organization. You specify the criteria (in the form of sending rules) that determines when each Closed-Incident survey will be sent. The sending rules are based on field information from a RightNow incident or CRM ticket.

Sending rules allow greater control over which surveys are sent to each customer. This capability enables you to create surveys containing explicit questions that target particular audiences. The questions in your survey can address distinct topics and contain details that would otherwise be too specific. The result is that you can effectively capture customer feedback by replacing vague questions with only the most pertinent questions tailored to a customer's specific situation.

Note: For Closed-Incident surveys to function, you must integrate RightNow Metrics with RightNow eService Center or another CRM package. You can also trigger the surveys manually by sending an email to RightNow Metrics. The sending rules function is dependent on how you set up the integration, including the fields contained in the trigger emails. For specific information about integrating RightNow Metrics with RightNow eService Center or another CRM package, refer to Chapter 10, "Integration."

Note: The procedures contained in this section assume that you have completed the integration process with either eService Center or another CRM program.

Processing Sending Rules

To harness the power of RightNow Metrics sending rules, you must understand what happens when RightNow Metrics receives a trigger email from eService Center or another CRM package. Steps in the process of sending rules are listed here.

1. When an incident has been solved in eService Center or your CRM package, a trigger email is sent to RightNow Metrics containing information about the incident such as the product, category, staff member, and the staff's group. The *pollster* utility parses the email for this information.
2. The information is then compared to the conditions of the sending rules of each Closed-Incident survey, starting with the survey of order 1, until a match is found.
3. When a match for a sending rule is found, that Closed-Incident survey is sent and the processing of the sending rules is terminated. The survey will be sent according to the schedule setting of the survey.

   Note: Sending rules must be specified for Closed-Incident surveys to be sent.

Only one survey is sent for each trigger email that is received by RightNow Metrics. If no match is made, then a Closed-Incident survey will not be sent. One of the sending rule conditions is "DEFAULT," which is an unconditional, catch-all condition that will automatically send a survey and terminate the processing of more rules. A rule with the DEFAULT condition can be used in conjunction with other rules or independently depending on your specific needs.

Sending rules are linked to an individual Closed-Incident survey. The order of the survey determines the sequence by which sending rules are processed. Thus, the sending rules for survey 1 (1 in the survey order) are the first read, followed by the rules for the second survey (2 in the survey order). In this sequenced manner, the set of sending rules for each survey are processed individually, yet combine to create a system. To change the order in which the sending rules are read, you need to change the order of the surveys.

In processing a set of sending rules for an individual survey, the rules have an OR relationship. Thus, one rule at a time is read and compared to the field information to find a match. If the condition of the first rule is met, then the processing of the rules is terminated and a survey is sent. If the condition of the first rule is not met, then the next rule is read independent of the first rule. In effect, each rule is a complete, isolated condition that, if met, will invoke the sending of a survey.

Constructing Sending Rules

The sending rule function is very flexible; therefore, you can organize your rules in several ways to meet the requirements of your organization. You should carefully define which surveys you want to send for each type of RightNow incident or CRM ticket before you define sending rules. This planning will help you construct a system of rules that functions properly.

To create sending rules you will need to know which fields are included in the trigger emails sent by eService Center or your CRM package. When integrating with eService Center, the default fields include product, sub-product, category, sub-category, staff, and group. For other CRM packages, the fields included in the trigger email depend on how the integration was configured.

If you are using a CRM package other than eService Center and you do not know how the trigger emails are formatted, you can check the information included in the trigger emails by activating a trigger email to be sent from your CRM package by closing an incident or ticket, accessing the mailbox that collects trigger emails, and then viewing the email. You will be able to see the format of the trigger emails, including the field names and field values. These are the values that will be used in the sending rules of RightNow Metrics. For more information on integrating RightNow Metrics with CRM software, refer to Chapter 10, “Integration.”

You will also need to know the exact values for the fields used in eService Center or your CRM package. For example, if your CRM contains the incident field “category,” you will need to know all of the possible categories, such as Installation, Troubleshooting, or Documentation. You should access eService Center or your CRM software to compile a list of these values. You must have the exact values, including correct case, for the sending rules to operate correctly.

Note: If you are upgrading from a previous version of RightNow Metrics, you must re-establish sending rules for all surveys, including those launched before the upgrade. For more information on upgrading from a previous version of RightNow Metrics, refer to the *RightNow Metrics 4.0 to 4.3 SmartConversion Guide*.

To create sending rules for Closed-Incident surveys:

1. Click Closed-Incident Surveys to open the Closed-Incident Surveys Details page.
2. Select Sending Rules from the Actions drop-down menu next to the survey you want to create a sending rule for and click Go.

Path: <u>Closed-Incident Surveys</u>>Sending Rules

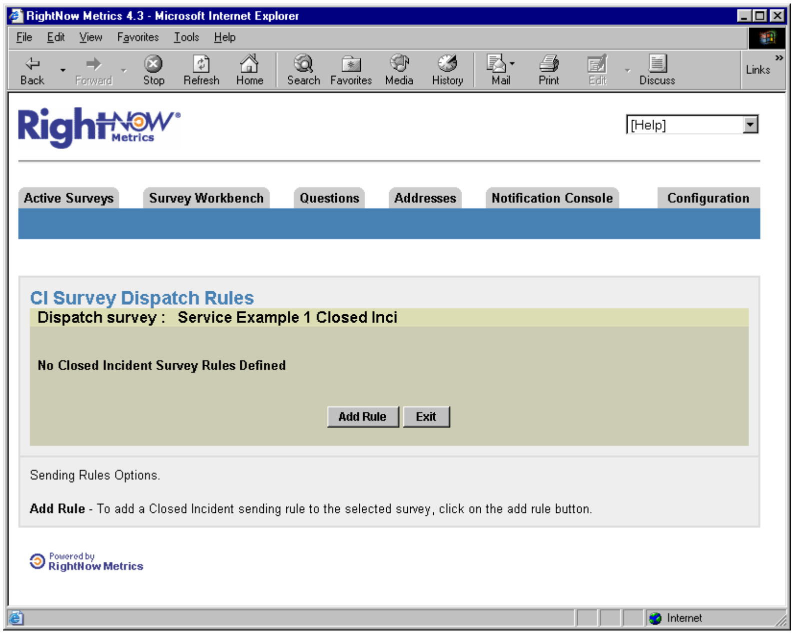


Figure 6-16: Sending Rules Page

3. Click **Add Rule** to add a Closed-Incident sending rule.

Path: ***Closed-Incident Surveys>Sending Rules>*** Add Rule

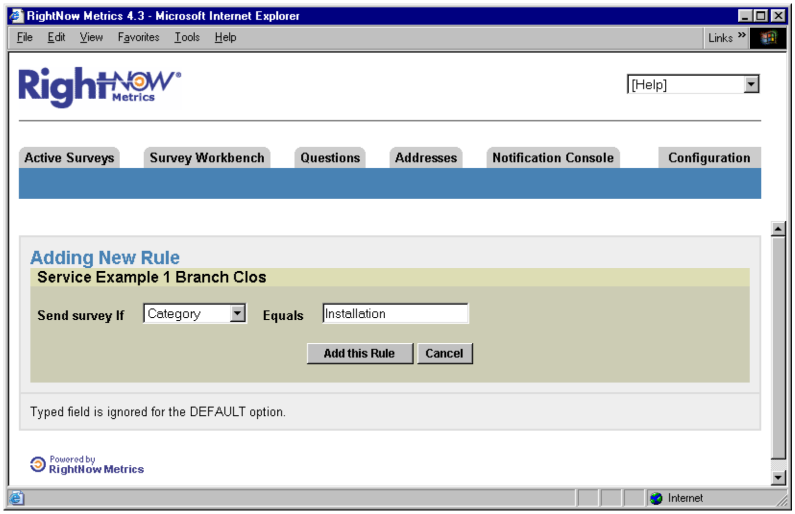


Figure 6-17: Adding New Rule Page

4. Select a field from the drop-down menu that corresponds with a field from your CRM package.

The field you choose in the drop-down menu must be present in the trigger email that your CRM package sends to RightNow Metrics. If you are using RightNow eService Center, the default fields included in the trigger emails are Product, Sub-Product, Category, Sub-Category, Group, and Staff.

5. Type a valid value for the chosen field in the text box to the right of EQUALS.

Note: The EQUALS value for the chosen field must be valid and must be typed exactly as it is in your CRM package. Access RightNow eService Center or your CRM software to compile a list of the valid values.

6. Click Add this Rule to add the sending rule for this Closed-Incident survey.

Note: Because sending rules use OR logic instead of AND logic, you can create more than one If condition for a sending rule. The trigger email must match only one of the If conditions for the survey to be sent.

Path: ***<u>Closed-Incident Surveys</u>>Sending Rules>*** **Add Rule** **>** **Add this Rule**

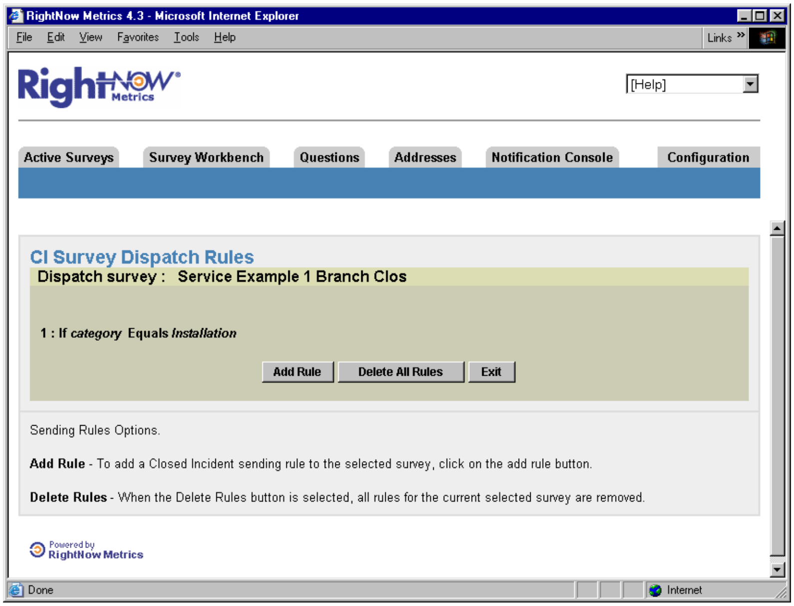


Figure 6-18: Closed-Incident Sending Rules Page

7. Click **Exit** to return to the Closed-Incident Details page.

Sending More On-Demand Surveys

You can send additional On-Demand surveys at any time using the Send More function in RightNow Metrics. This function allows you to enter additional email addresses for a survey, set the schedule, and define survey settings.

To send more On-Demand surveys:

1. From the Active Surveys page, click the On-Demand survey name to open the Survey Details page.

2. Select Send More from the Actions drop-down menu and click Go.

Path: Active Surveys>Survey Details>Send More

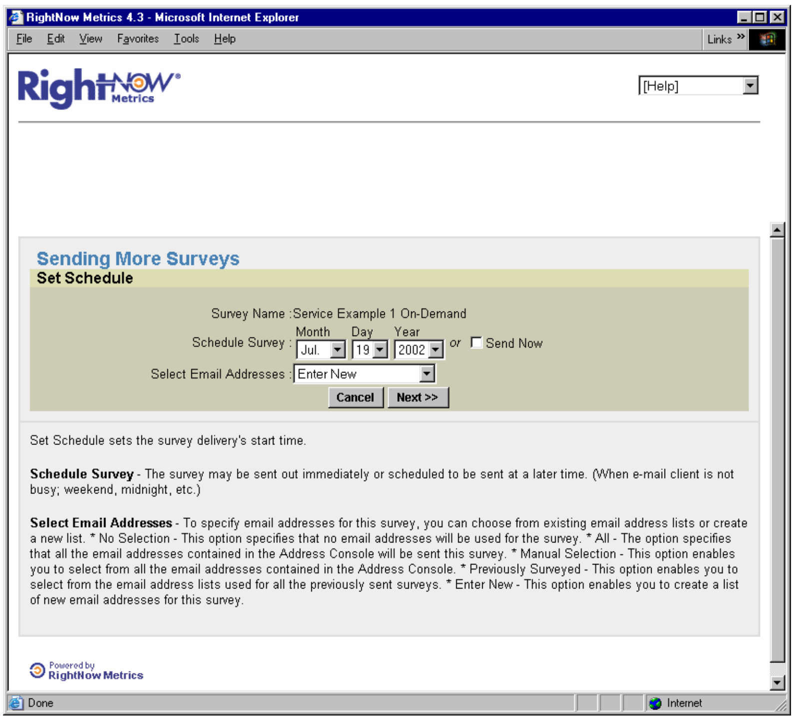


Figure 6-19: Sending More Surveys Page—First Page

3. Select a month, day, and year to send the survey or select Send Now to send the survey immediately.

4. Click Next > to open the Email Addresses to Send Survey to page.

Path: Active Surveys>Survey Details>Send More>Next

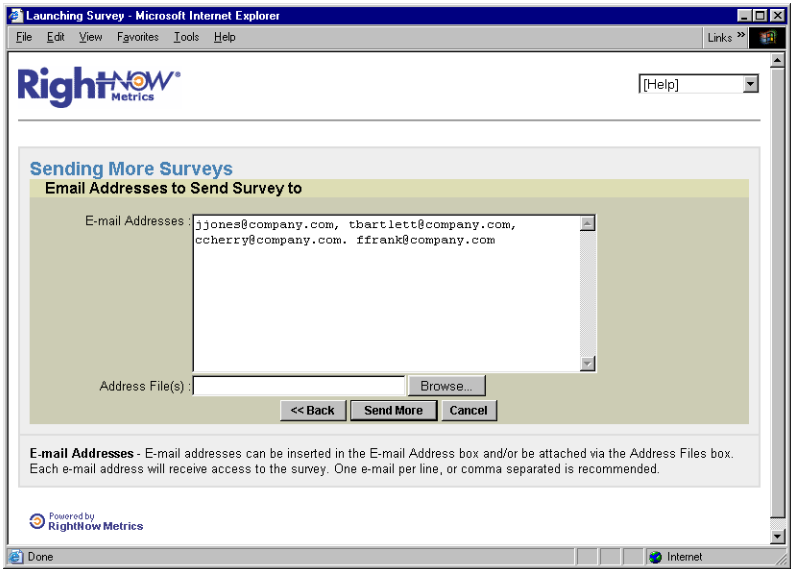


Figure 6-20: Sending More Surveys Page—Second Page

5. Type the email addresses of the participants in the Email Address field or click Browse... to attach an address list in the Address File(s) field to select the people to receive the survey.

6. Click Send More to open the Email Information page.

Path: Active Surveys>Survey Details>Send More>Next>Send More

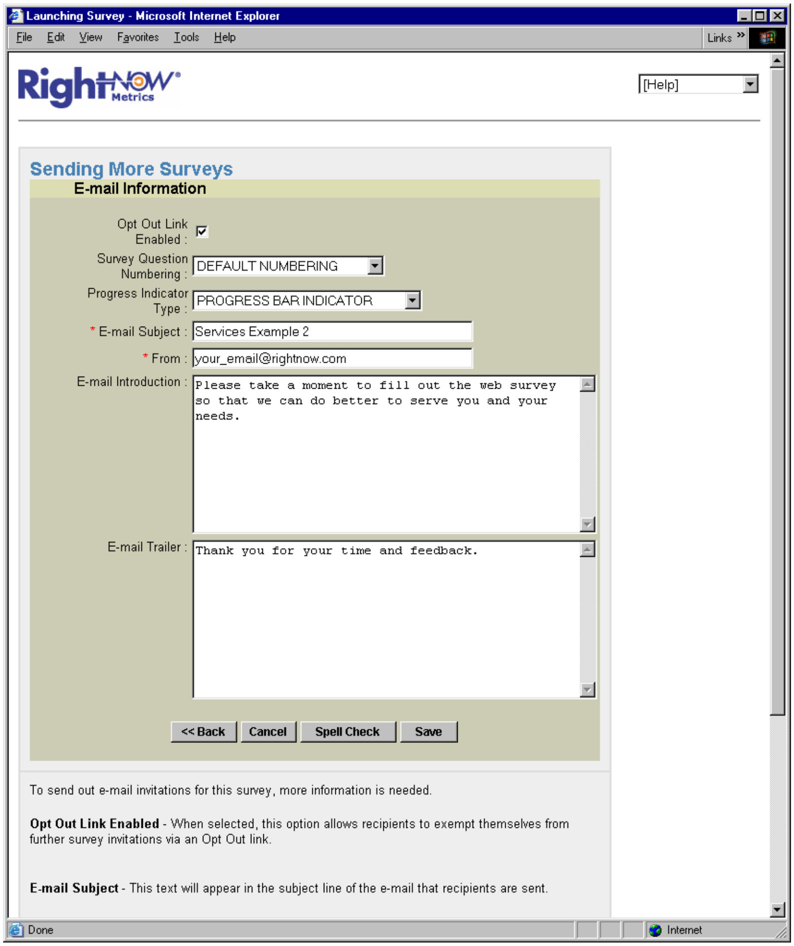


Figure 6-21: Sending More Surveys Page—Third Page

Note: A red asterisk indicates a required field.

7. Enter information in fields described in Table 6-3, “Survey Settings Page Field Descriptions,” on page 6-17.

8. To the text in each field, click **Spell Check**.

9. Click **Save** to send the surveys to the email addresses specified on the previous page and open the Sending More Surveys page.

Path: Active Surveys>Survey Details>Send More>Next>Send More>Save.

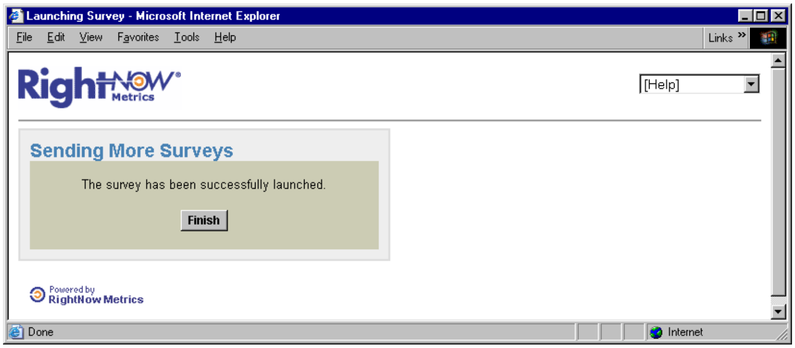


Figure 6-22: Sending More Surveys Page—Fourth Page

10. Click Finish to complete the send more action and return to the Survey Details page.

Manually Entering Survey Responses

The Enter Data feature enables you to manually input survey responses into the results of an On-Demand survey. This feature is useful for survey information that has been gathered outside of RightNow Metrics (for example via the telephone or mail). Once the survey data is entered into RightNow Metrics, you can manage one survey that uses several distribution media to take advantage of RightNow Metrics reporting capability to analyze the survey results.

Note: This feature applies only to On-Demand surveys using the anonymous tracking method.

To enter data for an On-Demand survey using the anonymous tracking method:

1. From the Active Surveys page, click the survey name to open the Survey Details page.

2. Select Enter Data from the Actions drop-down menu and click Go.

Path: Active Surveys>Survey Details>Enter Data

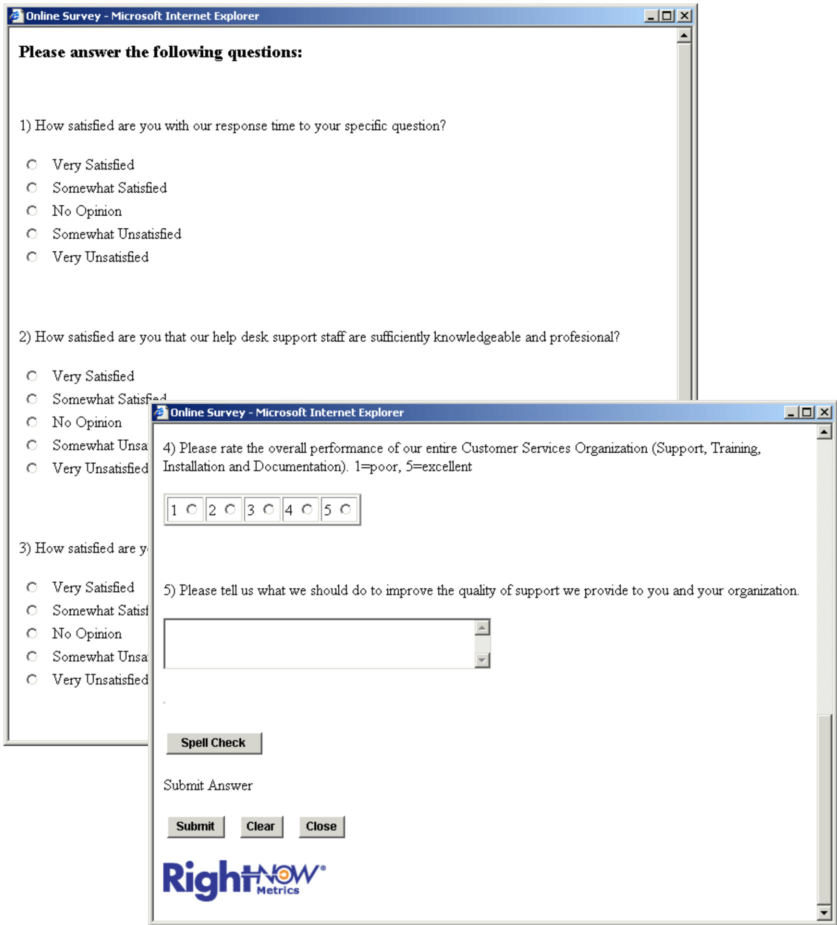


Figure 6-23: Enter Data Page

3. Enter the appropriate answers for each question.

4. Click **Submit** to enter the responses to the survey results. The data will be instantly entered into the RightNow Metrics database.

Results

Analyzing survey results is the most valuable aspect of conducting a survey. The results can help you determine if you are on target with your customer service and assist you in making any necessary changes. As described in Chapter 6, RightNow Metrics provides you with a variety of methods for viewing survey results and obtaining the appropriate level of detail from those results.

You can display survey results in the following methods:

- Graphical Results
- Tabular Results
- List of Responders
- List of Emails Sent
- Scoring Results
- Participants
- URL Links
- Usage Statistics

Selecting the output format for survey results is a powerful feature that provides you with professional graphs and tables that can be displayed on your Web site or saved to a file for further analysis. You can also output a list of the email addresses that were sent surveys and a list of responders, and then cut and paste the lists into another program.

For graphical results, you can drill down data by clicking on a bar or point in a graph to access another level of detail. For example, after drilling down you can view the individual customers who responded to a survey question with a particular answer.

RightNow Metrics also provides a way for you to allow survey participants to view survey results. You can send participants directly to the survey results on a Web page after they respond to a survey or provide them with a link to the results. For additional information on allowing survey participants to view survey results, refer to Table 4-6, "Select Survey Settings Field Descriptions," on page 4-32.

In this chapter you will work with the methods for displaying survey results and customizing graphical results.

Key Terms

Before you begin working with survey results, you will want to become familiar with the terminology and features discussed throughout this chapter.

CSV (comma separated value)—A tabular results format for displaying survey results as raw data in CSV format to export into another application for further analysis.

Drill down—A feature for viewing another level of detail by clicking on a bar or point in a graph.

Graphical Results—An output format for displaying results in either pie or bar graphs.

PDF (Portable Document Format)—A tabular results format for displaying survey results using the PostScript printer description language, which can be read by the Adobe Acrobat Reader and other readers.

Tabular Results—An output format for displaying survey results in a table.

Selecting Parameters to Display Results

RightNow Metrics allows you to query survey responses to display specific survey results. In this way, you can conduct focused analysis on your survey results. For On-Demand and Closed-Incident surveys, you can select the start and end date and the result output format. In addition, for Closed-Incident surveys, you can query the results using incident field information, such as product, category, and staff to display only the results you need.

Displaying On-Demand Survey Results

To display On-Demand survey results, you must select the start and end dates and the result output format.

To select parameters for results:

1. Click Active Surveys.

Path: Active Surveys

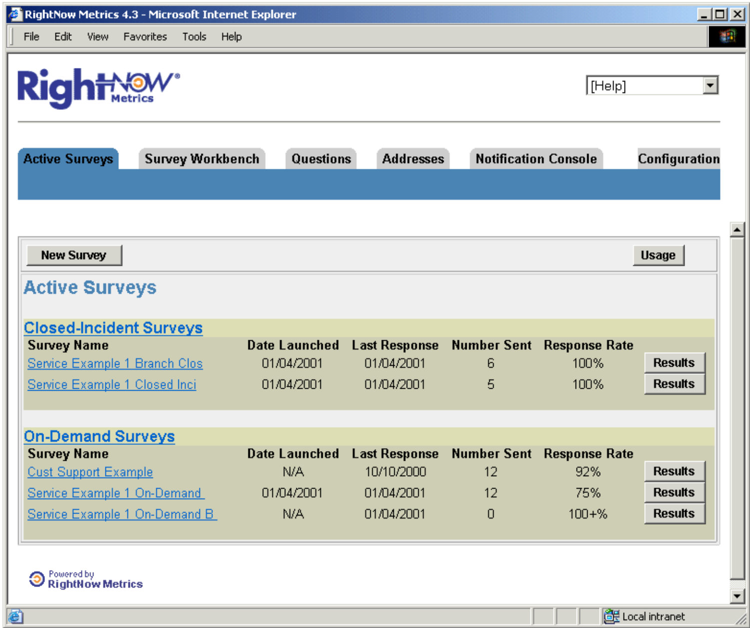


Figure 7-1: Active Surveys Page Showing Results Buttons

2. Click **Results** next to the appropriate survey. You will open the Survey Results page.

   Note: **Results** will not be available if survey responses have not been received.

Path: Active Surveys> Results

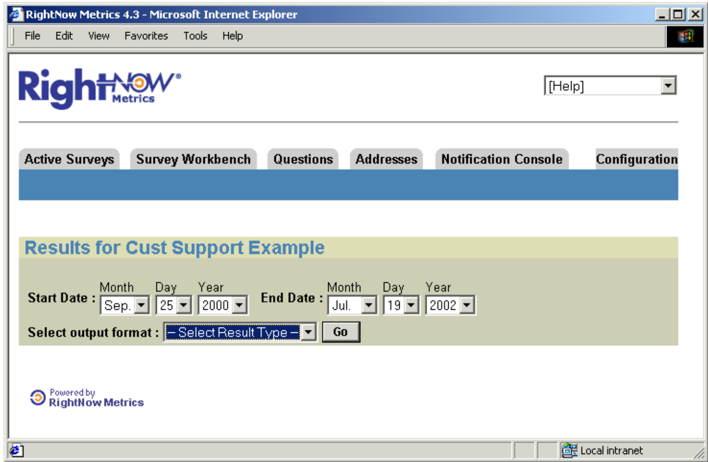


Figure 7-2: Survey Results Page

3. Select the desired date range from the Start Date and End Date drop-down menus. By default, the date range is the survey's launch date and the current date.

4. Select the output format from the Select Output Format drop-down menu. Options include Graphical Results, Tabular Results, List of Responders, List of Emails Sent, or Scoring Results. See "Displaying Survey Results" on page 7-7 for a description of each option.

5. Click Go. A separate Web browser will open and display your results in the specified format.

Displaying Closed-Incident Survey Results

To display Closed-Incident survey results, you must select the start and end dates, results output format, and values from the incident fields in RightNow eService Center or another CRM program.

Values in the drop-down menus that correspond to the incident fields in RightNow eService Center or another CRM program are passed to RightNow Metrics in the trigger information and are available to query the results of Closed-Incident surveys for specific information.

To display Closed-Incident survey results:

1. Click Active Surveys.

***Path:* Active Surveys**

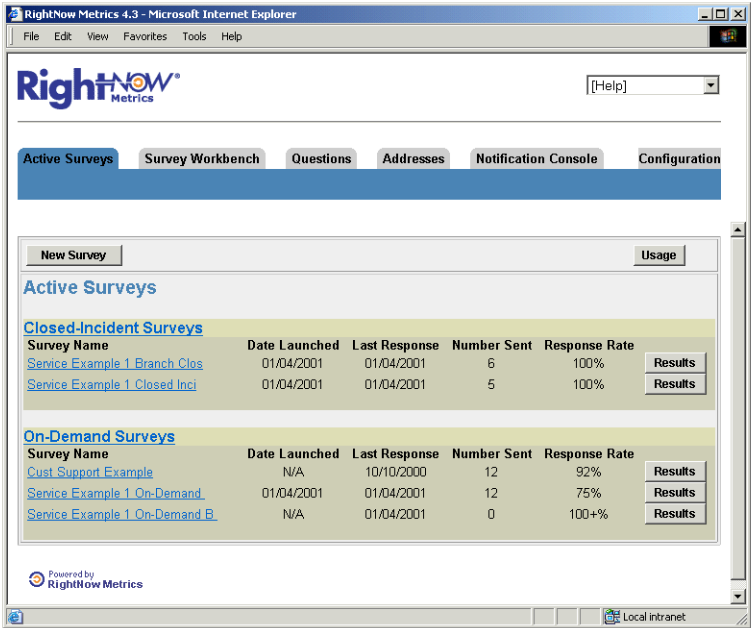


Figure 7-3: Active Surveys Page Showing Results Buttons

2. Click Results next to the appropriate survey. You will open the Survey Results page.

Note: Results will not be available if survey responses have not been received.

Path: Active Surveys> Results

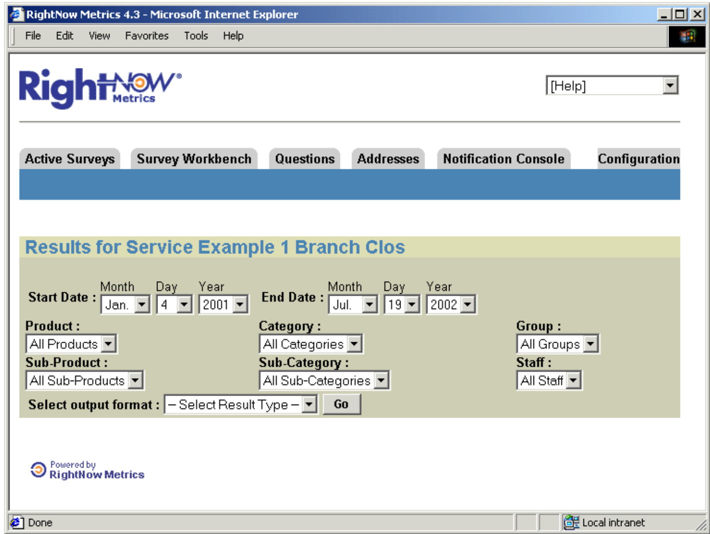


Figure 7-4: Survey Results Page

3. Select the date range from the Start Date and End Date drop-down menus. By default, the date range is the survey's launch date and the current date.

4. Select the Product, Category, Sub-product, Sub-category, Staff, and Group from the corresponding drop-down menus.

In RightNow eService Center, the incident fields include Product, Sub-Product, Category, Sub-Category, Staff, and Group. By selecting values from the drop-menus, you can narrow the scope of the displayed results and display only the survey results that pertain to your needs. One example would be to display results of a customer satisfaction survey by staff member to evaluate the effectiveness of your customer service representatives.

5. Select the output format from the Select Output Format drop-down menu. See "Displaying Survey Results" on page 7-7 for more information.

6. Click Go. A separate Web browser will open and display your results.

Displaying Survey Results

To assist you in analyzing your survey results, RightNow Metrics provides the following methods for displaying survey results and obtaining the appropriate level of detail from those results.

Note: For surveys using Email distribution, you must establish a mailbox to receive survey results. The *pollster* utility accesses the Reply To mailbox and parses the results from the response emails to compile the survey results. Responses will be tallied and visible within the survey the next time *pollster* runs. Refer to the *RightNow Metrics 4.3 Installation Guide* for additional information.

Graphical—This format provides an easily understood display of survey results in colored bar graphs and pie graphs with compiled statistics such as mean value, mode value, and standard deviation. You can select two- or three-dimensional pie and bar graphs with the bars displayed either horizontally or vertically. Refer to "Displaying Graphical Results" on page 7-8 for sample graphs and additional information about graphical results.

Tabular—This format presents the survey results as text and numbers in a basic table with no statistics or graphics. Each survey response is listed consecutively in the table with each respondent's email address. This format gives you access to each respondent's answers in a display that allows for a quick review of the data as well as a detailed examination of the actual responses to each question. Refer to "Displaying Tabular Results" on page 7-19 for more information.

> **Comma Separated Value (CSV)**—Within the tabular format, you can choose to display survey results as raw data in CSV format. This enables you to save the survey results and import them into most other applications for further analysis, or to create reports using the survey data. Refer to "Displaying Tabular Results" on page 7-19 for information about displaying survey results in CSV format.
>
> **Portable Document Format (PDF)**—Also within the tabular format, you can choose to display survey results using the PostScript printer description language, which can be read by the Adobe Acrobat Reader and other readers. Refer to "Displaying Tabular Results" on page 7-19 for information about displaying survey results in PDF format.

List of Responders—This format displays all of the email addresses of those who responded to your survey. You can then cut and paste from the displayed results to analyze your data in another program. Refer to "Displaying List of Responders" on page 7-21 for instructions on displaying this list.

List of Emails Sent—This format displays all of the email addresses that have been sent the survey you are viewing. You can also cut and paste from the displayed results to analyze your data in another program. Refer to "Displaying List of Emails Sent" on page 7-22 for instructions on displaying this list.

Score Results—This format displays any score values you have set for the questions in your survey and any notifications you have defined. Refer to "Displaying Score Results" on page 7-23 for instructions on displaying score results.

Note: RightNow Metrics has two additional survey reports, Participants and URL Links, which can be accessed through the Survey Details page. For more information, refer to "Displaying Reports from the Survey Details Page" on page 7-25.

Displaying Graphical Results

Graphing your results provides a quick and easy way to view and compare the results from survey respondents and is especially effective for multiple choice and range questions.Two types of graphs are available for graphical results: pie and bar graphs. Multiple graph orientations are also available for pie and bar graphs. Sample pie and bar graphs in two- and three-dimensional views are presented in “Graph Types” on page 7-12.

You can also modify how the graphical results are displayed by rearranging the question order, removing questions, specifying the type of graph for each question, and adding HTML to the top of the display page. For more information, refer to “Customizing Graphical Display” on page 7-15.

Note: Graphical results are available for range, multiple choice, and check all question types. Responses to short answers are displayed in text format only. The answers to each question are shown in order, starting with the most recent response. In Graphical Results, short answers appear below the question. In Tabular Results, short answers appear in text boxes.

Viewing Graphical Results

By default, the Survey Results page displays graphs or data, depending on the question type, for all the questions in the survey; the question name and type appear before each graph along with the question’s text. Each graph contains a legend showing the color that corresponds to an answer and the number of respondents that have selected that particular answer. The graphs display a variety of statistics to help you read and interpret the results, which can assist you in understanding respondents’ survey results.

From this page, you can choose the graph type for each multiple choice, range, and check all question. You can also choose to customize the graphical report by rearranging the question order, removing questions, and adding text or graphics to the top of the page.

***Path:* *Active Surveys>* Results *>Graphical Results>* Go**

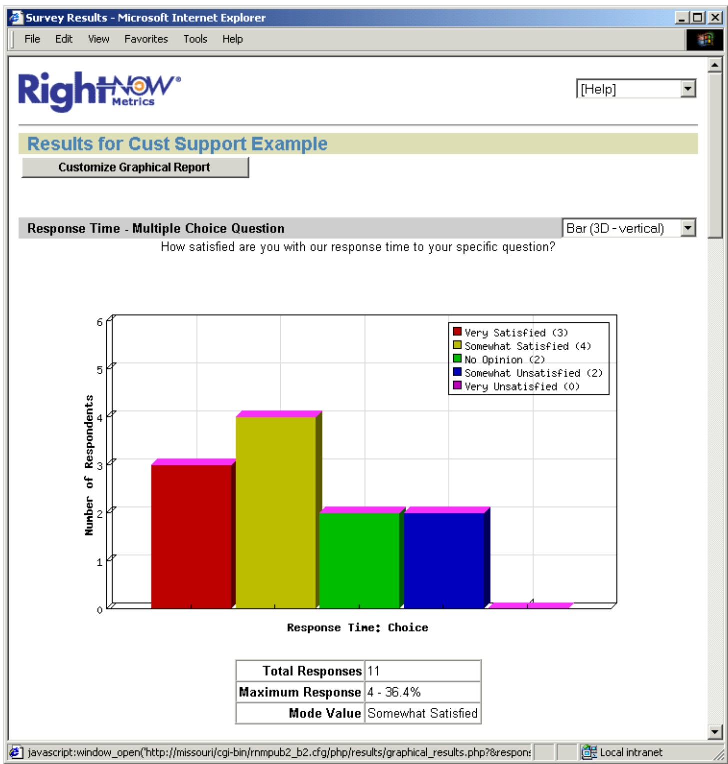


Figure 7-5: Graphical Results for a Multiple Choice Question

Below each graph, a table of statistics displays information about how respondents answered the question. The statistics vary between question type.

Graphs for multiple choice and check all questions include the following statistics: Total Responses, Maximum Response, and Mode Value statistics. Figure 7-5 shows a multiple choice question. Table 7-1 contains a description of results and statistical information available for multiple choice and check all questions.

Table 7-1: Multiple Choice and Check All Question Results Statistics

Term	Description
	Click this button to modify the how graphical results are displayed. You can rearrange the question order, remove questions from the display, and add text and graphics to the top of the Survey Results page.
	Click this drop-down menu to select a different graph type for a question. The page will reload and your new graph will be displayed.
Total Responses	This value indicates the total number of responses for the question.
Maximum Response	This value indicates the answer choice that was chosen most frequently. The number of respondents that chose the answer choice and the percentage of the total are indicated.
Mode Value	Like the Maximum Response, Mode Value indicates the most frequent answer chosen. Mode Value lists the text of the answer choice.

Graphs for range questions include the following statistics: Total Responses, Valid Range, Response Range, Mean Value, Mode Value, and Standard Deviation statistics.

Path: Active Surveys> Results > Go

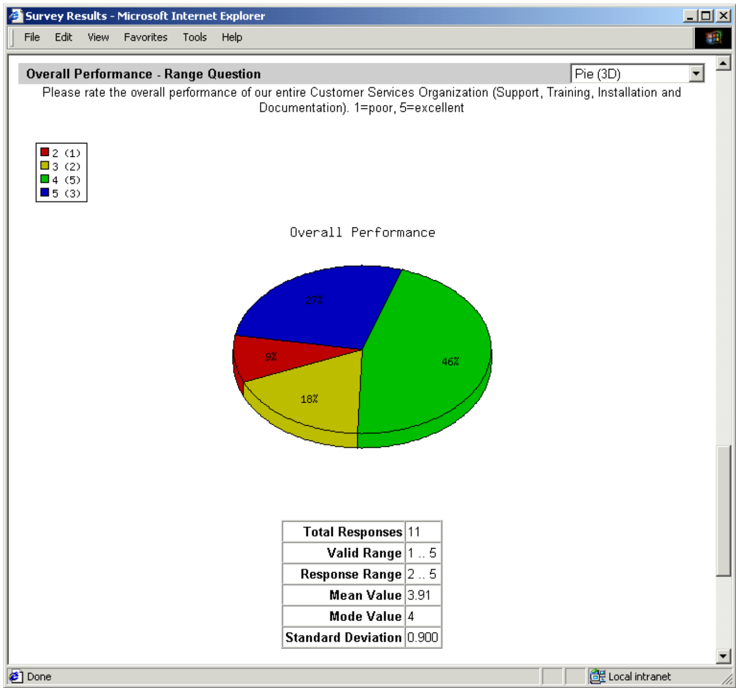


Figure 7-6: Graphical Survey Results for Range Question

Table 7-2 contains a description of results and statistical information available for range questions.

Table 7-2: Range Question Results Statistics

Term	Description
Total Responses	This is the total number of responses for the question.
Valid Range	This is the range for the question (defined when a question is created). Refer to Chapter 5, “Questions” for more information on range questions.
Response Range	This is the range of responses.
Mean Value	This is the average value for the responses.
Mode Value	This is the most frequent value for the responses.

Table 7-2: Range Question Results Statistics (Continued)

Term	Description
Standard Deviation	This is a measure of the spread or dispersion of a set of data and is calculated by taking the square root of the variance (or difference).

Graph Types

This section contains sample graphs for each graph type in RightNow Metrics. On the Survey Results page, each graph contains the question name, graph legend, and response statistics.

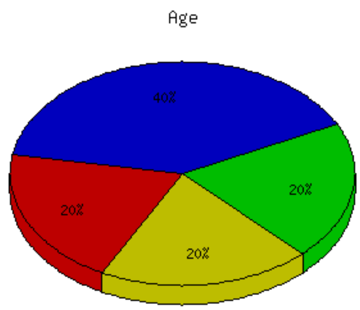


Figure 7-7: Three-Dimensional (3-D) Pie Graph

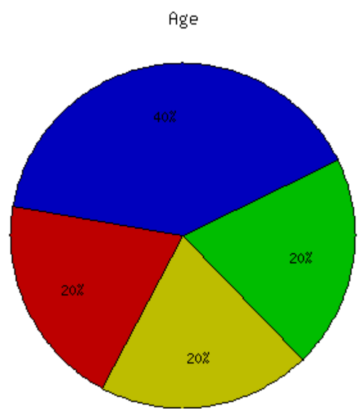


Figure 7-8: Two-Dimensional (2-D) Pie Graph

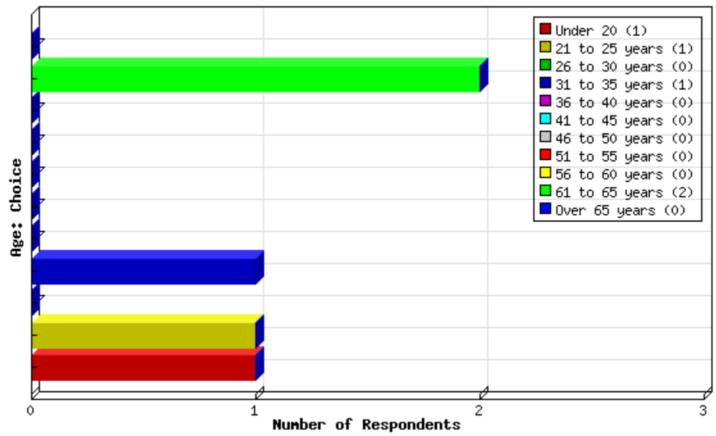


Figure 7-9: Three-Dimensional (3-D) Horizontal Bar Graph

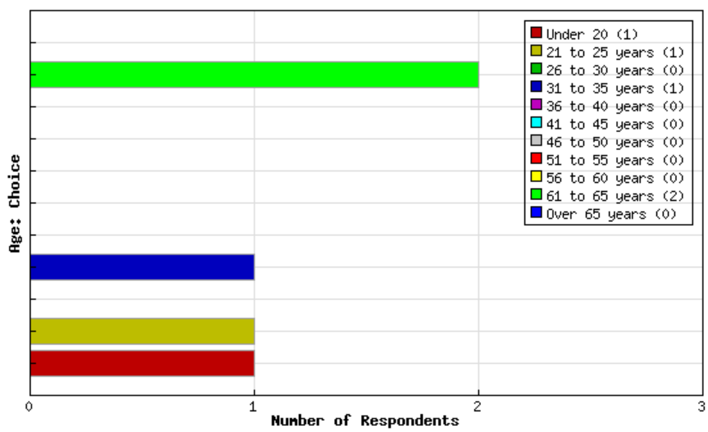


Figure 7-10: Two-Dimensional (2-D) Horizontal Bar Graph

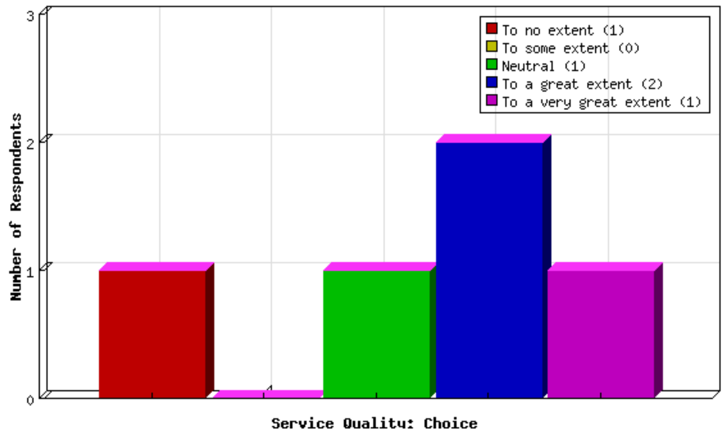


Figure 7-11: Three-Dimensional (3-D) Vertical Bar Graph

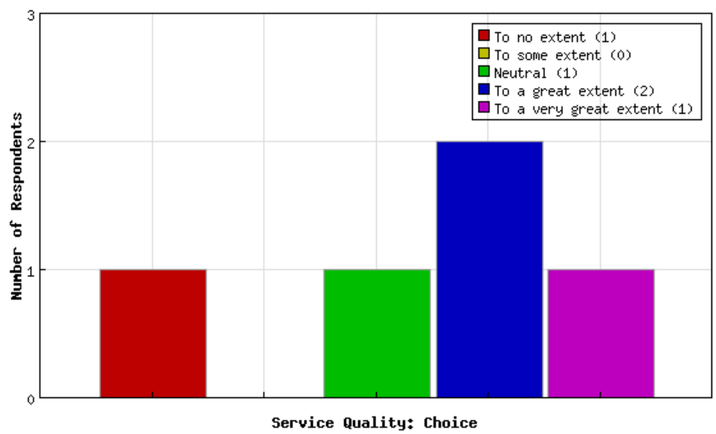


Figure 7-12: Two-Dimensional (2-D) Vertical Bar Graph

Exporting Graphs

Once you display a graph, you can save it to paste or import into another program by placing the cursor over the graph and right-clicking your mouse. From the pop-up menu, select either Copy or Save Picture (or Image) As to capture the graph image.

Customizing Graphical Display

You can customize the graphical display of questions in a survey, including changing graph type, modifying question display order, removing questions, and adding text and graphics to the top of the page. You can then view the graph to see if it displays the questions in the format you want.

Changed

Customizing the results display enables you to tailor the display of your RightNow Metrics survey results for your specific needs, such as presentations or reports. You may also want to customize your results if you allow your survey participants to view the results.

To customize the display of graphs:

1. Click **Results** next to the appropriate survey.
2. Select Graphical Results from the Select Output Format drop-down menu and click **Go**. A separate Web browser opens and displays your graphical results.
3. Click **Customize Graphical Report** to modify the Survey Results page.

Path: Active Surveys> Results ***>Graphical Results>*** Go ***>*** Customize Graphical Report

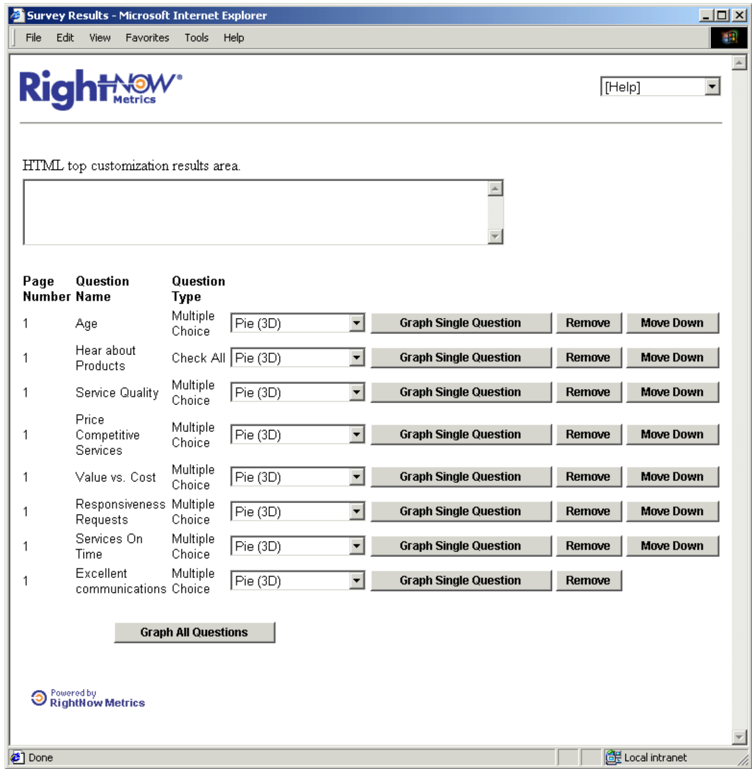


Figure 7-13: Customizing Graphical Display of Survey Results

4. To add text, graphics, and hyperlinks to the top of the Survey Results page, enter valid HTML into the HTML Top Customization Results Area. These elements will be added immediately after the body tag. You can add up to 25,000 characters to this customization area.

5. To select a new graph type for a question, click the Pie (3D) drop-down menu.

6. To preview the question in a new graph type, click Graph Single Question. This opens a separate Web browser.

7. To exclude a question's graph from being displayed, click Remove.

8. To move a question's graph down one in the display order, click Move Down.

9. After customizing your report output, click Graph Single Question to display the results.

Drilling Down Survey Results

The drill-down feature allows you to display a single graph in a Web browser to compare two or more graphs. You can also display a list of email addressees of the respondents who chose a particular answer.

To drill down:

1. From the Survey Results page, click the graph you want to drill down into. A Web browser will open and display the single graph.
2. Click an answer choice to display a list of all respondents' email addresses.

Path: Active Surveys> Results ***>Graphical Results>*** Go ***>Click Desired Graph***

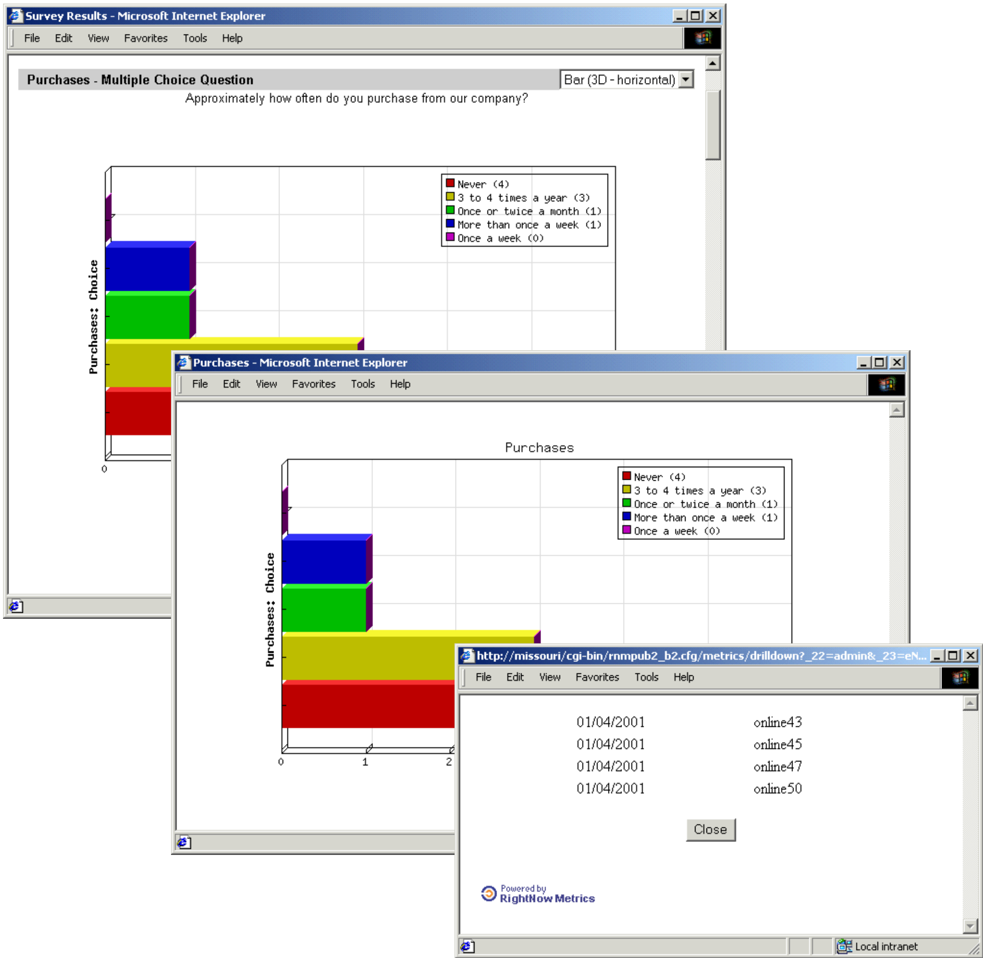


Figure 7-14: Drill Down Results

Figure 7-14 illustrates the drill-down sequence. From the Survey Results page, click a graph to open a Web browser and display the graph. Then, click a bar in the graph to display a list of the email addresses for those respondents who chose that particular answer.

Displaying Tabular Results

Survey results displayed in tabular format provide a complete list of answers from each respondent. The tabular format displays response date, email address of the respondent, and the question names as column headings. This format enables you to quickly view specific details about each question and response.

You can also output your data into CSV or PDF files from the Tabular Results page. You can use these files to import the results into another program to analyze or report your data.

Path: Active Surveys> Results ***>Tabular Results>*** Go

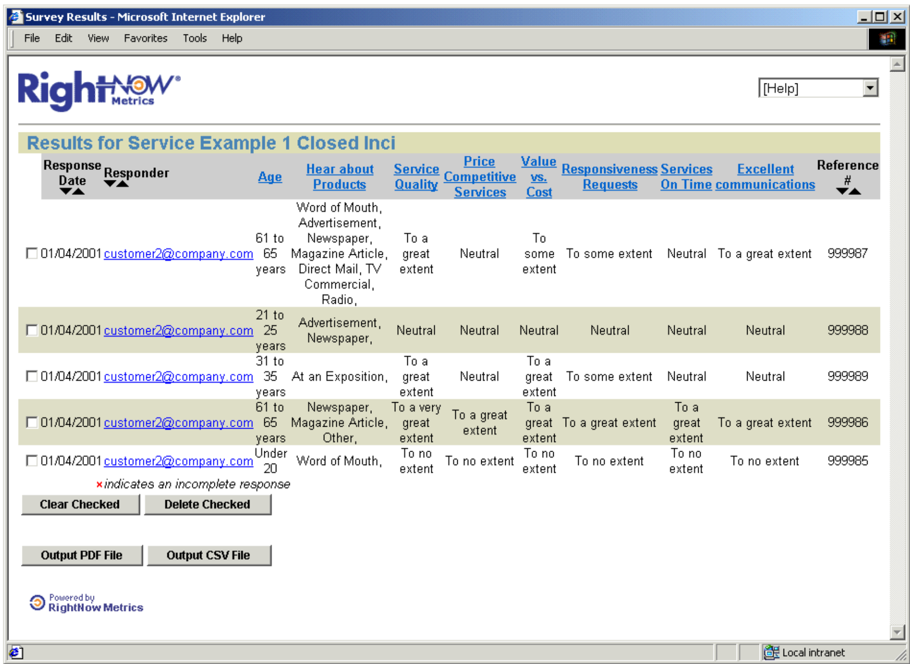


Figure 7-15: Tabular Survey Results for Closed-Incident

You can sort tabular survey results by Response Date, Responder, or by incident number (Closed-Incident surveys only) by clicking on the arrow in the column heading. You can view the question in a new Web browser by clicking on the question name in the column heading. You can also click an email address to view the actual survey with the respondent's answers.

Table 7-3 describes the buttons and fields on the Tabular Results page.

Table 7-3: Tabular Survey Results Descriptions

Field/Button	Description
Check Box	Select the box to the left of the survey response you want to delete from the displayed results. This allows you to highlight certain survey responses that do not match the rest of the responses, giving you the flexibility to modify the results as necessary.
Response Date	The date the survey response was received by RightNow Metrics.
Responder	The e-mail address the survey was received from.
<customer@company.com>	Click this link to view the actual survey from the respondent. A new Web browser will open and display the survey with the respondent's answers.
Clear Checked	Click this button to clear all check boxes.
Delete Checked	Click this button to remove the survey results from the database for the e-mail address checked.
Output PDF File	Click this button to open a PDF of the survey summary of the responses. A percentage is listed next to each answer in the survey. The number represents the percentage of the participants who selected that answer choice.
Output CSV File	Click this button to save the survey results data in CSV format.

Displaying List of Responders

In addition to choosing an output format for survey results, you can also display the email addresses of those who responded to your survey. This list can be useful for collecting demographic information and identifying future target groups. From the displayed results, you can cut and paste email addresses into another program to analyze your data.

To display a list of responders:

1. Open the Survey Results page and select List of Responders from the Select Output Format drop-down menu.

2. Click Go. A separate Web browser will open and display your graphical results.

Path: Active Surveys> Results ***>List of Responders>*** Go

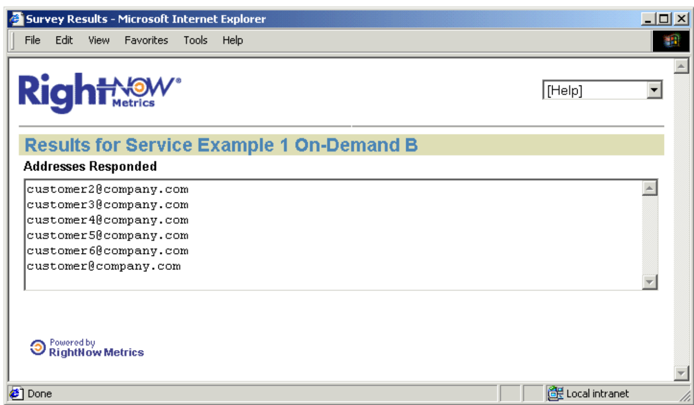


Figure 7-16: Survey Results—List of Responders

Displaying List of Emails Sent

Like the List of Responders, the List of Emails Sent displays email addresses that have been sent surveys. You can use this list for future survey mailings. From the displayed results, you can cut and paste email addresses into another program to analyze your data.

To display a list of emails sent:

1. Open the Survey Results page and select List of Emails Sent from the Select Output Format drop-down menu.

2. Click Go. A separate Web browser will open and display your graphical results.

***Path: Active Surveys>* Results *>List of E-mails Sent>* Go**

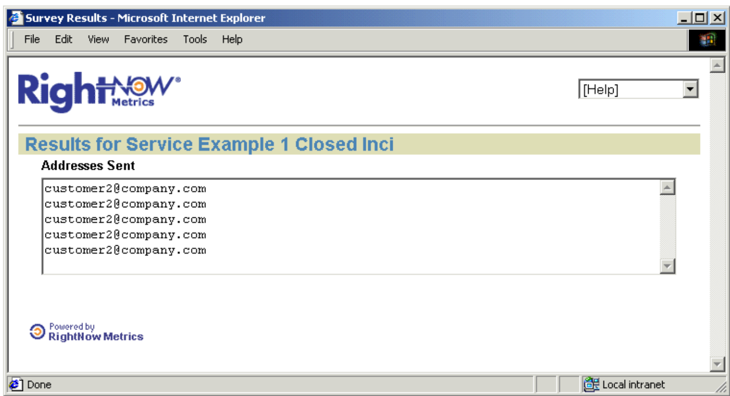


Figure 7-17: Survey Results—List of E-mails Sent

Note: The List of Responders and List of E-mails Sent can be displayed together in the Participants report (see “Viewing Participants Report” on page 7-25). This report displays a complete list of answers from each respondent.

Displaying Score Results

If you set score values for the questions in your survey, you can view these results along with any notifications you have defined. (See “Scoring a Survey” on page 6-21 for instructions on scoring questions and setting up e-mail notifications.)

The Score Results page displays results in tabular format with the question name, the answer text, and the score of the answer.

To display score results:

1. Open the Survey Results page and select Score Results from the Select Output Format drop-down menu.

2. Click Go. A separate Web browser will open and display your score results.

Path: Active Surveys> Results ***>Score Results>*** Go

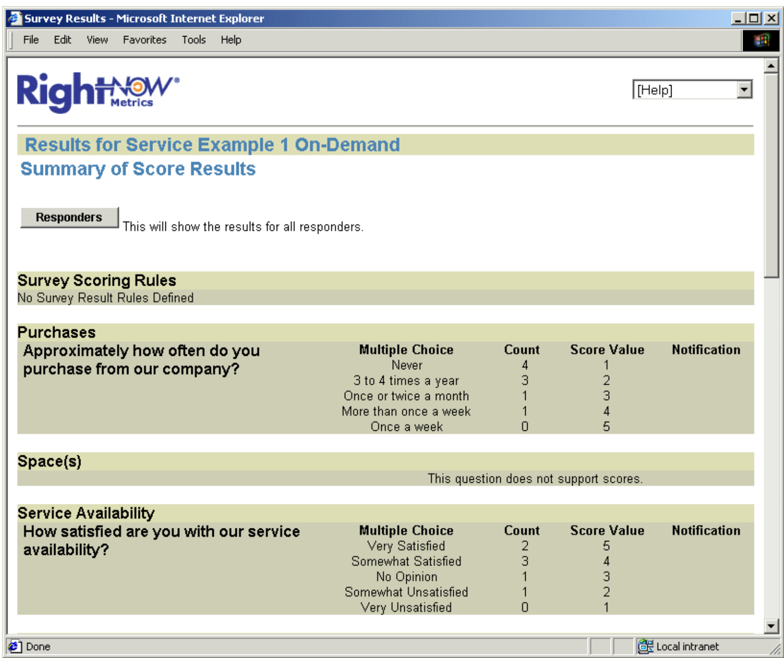


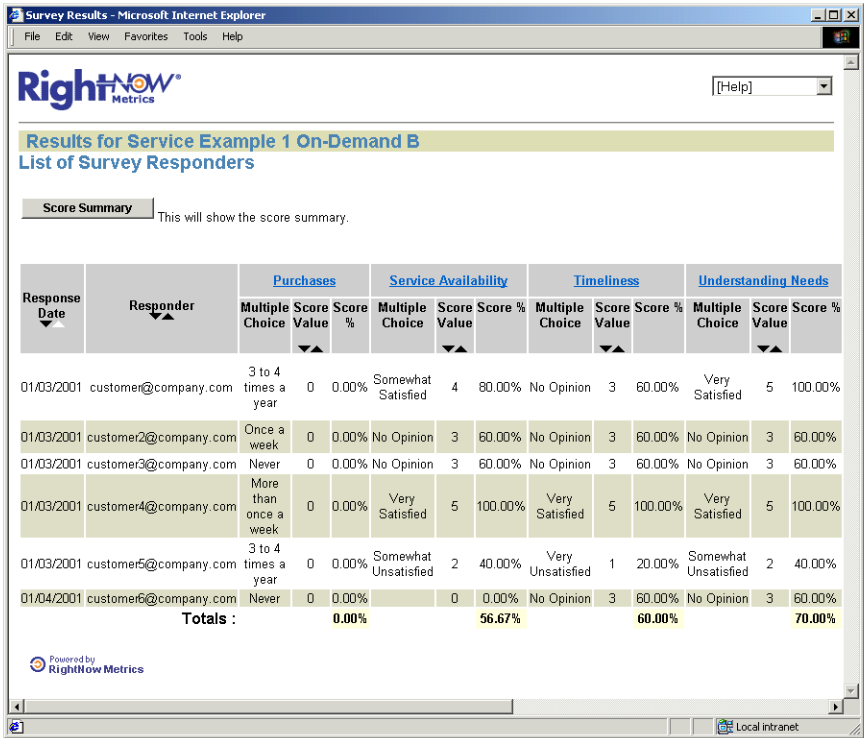
Figure 7-18: Summary of Score Results

In addition to viewing the summary of score results, you can also view a list of respondents from the Summary of Score Results page. This tabular report displays response date, email address of the respondent, and the question names as column headings. For each question, the repondent’s answer choice and the score value for that answer choice are displayed. For multiple choice and range questions, the corresponding score percentage is displayed, which is a percentage relative to the score value. For example, if the score range is from 1 to 5, then 5 would have a score percentage of 100% and 1 would have a score percentage of 20%.

To view respondents:

1. Click **Responders** on the Summary of Score Results page.

Path: Active Surveys> **Results** ***>Score Results>*** **Go** **>** **Responders**



Response Date	Responder	Purchases: Multiple Choice	Purchases: Score Value	Purchases: Score %	Service Availability: Multiple Choice	Service Availability: Score Value	Service Availability: Score %	Timeliness: Multiple Choice	Timeliness: Score Value	Timeliness: Score %	Understanding Needs: Multiple Choice	Understanding Needs: Score Value	Understanding Needs: Score %
01/03/2001	customer@company.com	3 to 4 times a year	0	0.00%	Somewhat Satisfied	4	80.00%	No Opinion	3	60.00%	Very Satisfied	5	100.00%
01/03/2001	customer2@company.com	Once a week	0	0.00%	No Opinion	3	60.00%	No Opinion	3	60.00%	No Opinion	3	60.00%
01/03/2001	customer3@company.com	Never	0	0.00%	No Opinion	3	60.00%	No Opinion	3	60.00%	No Opinion	3	60.00%
01/03/2001	customer4@company.com	More than once a week	0	0.00%	Very Satisfied	5	100.00%	Very Satisfied	5	100.00%	Very Satisfied	5	100.00%
01/03/2001	customer5@company.com	3 to 4 times a year	0	0.00%	Somewhat Unsatisfied	2	40.00%	Very Unsatisfied	1	20.00%	Somewhat Unsatisfied	2	40.00%
01/04/2001	customer6@company.com	Never	0	0.00%		0	0.00%	No Opinion	3	60.00%	No Opinion	3	60.00%
	Totals :			0.00%			56.67%			60.00%			70.00%

Figure 7-19: List of Survey Responders for Web-based Survey

2. To return to Score Results, click **Score Summary**.

Displaying Reports from the Survey Details Page

In addition to displaying survey results in a variety of formats, you can also generate additional reports from the Reports drop-down menu on the Survey Details page. Options include:

- Results—Refer to “Selecting Parameters to Display Results” on page 7-2.
- Participants—Refer to “Viewing Participants Report” on page 7-25.
- URL Links—Refer to “Viewing URL Links Report” on page 7-26.
- Customizing Graphical Results—Refer to “Customizing Graphical Display” on page 7-15.

Viewing Participants Report

The Participants report enables you to view the email addresses of the participants who received surveys and those who sent survey responses. This report keeps a log of all the email addresses that received surveys for each sending action of a survey.

For example, if you created an On-Demand survey and initially sent the survey to several hundred e-mail addresses, and then sent more surveys a few days later, all of the e-mail addresses used in both of the mailings would be logged in the Participants report. You can easily keep track of the survey recipients to determine who has received specific surveys and whether or not to send them additional surveys. You can also track the e-mail addresses of those who responded to surveys, enabling you to narrow your survey mailing list to target only those participants who have responded to previous surveys.

Note: The Participants report displays the information from the List of Emails Sent and List of Responders. Refer to “Displaying List of Emails Sent” on page 7-22 and “Displaying List of Responders” on page 7-21.

To view the Participants report:

1. Click **Active Surveys** to open the Active Surveys page.
2. Click the survey name of the desired survey to open the Survey Details page.
3. Select **Participants** from the Reports drop-down menu and click **Go**.

Path: Active Surveys>survey name>Participants

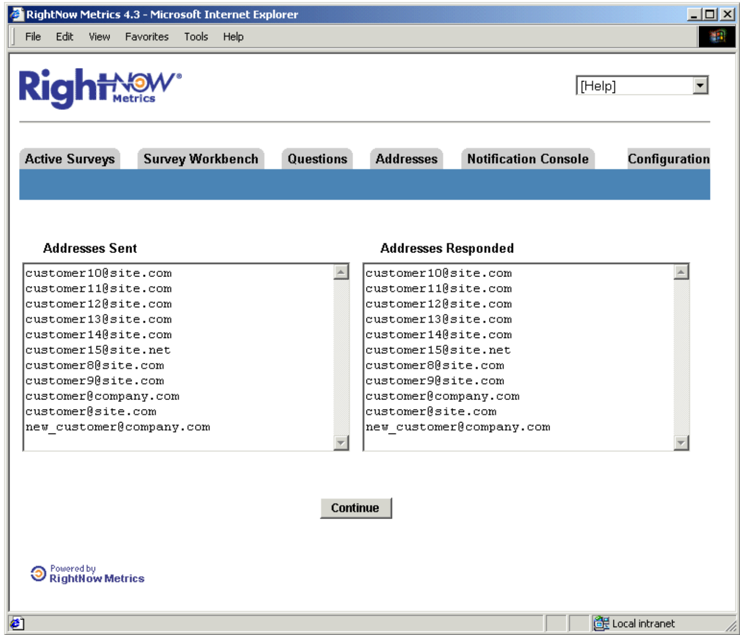


Figure 7-20: Participants Reports

Viewing URL Links Report

The URL Links report displays the URL of the survey (for Email Link and Email HTML distribution methods) and the URL of the survey results (all distribution methods) that RightNow Metrics creates when the survey is launched. Using these URLs, you can insert links into a Web page or an email to allow participants to access the survey and view the survey results. This gives you the flexibility to integrate a survey from RightNow Metrics into your Web site or to use an external email program to send your survey invitations.

To view the URL Links report:

1. Click **Active Surveys** to open the Active Surveys page.
2. Click the survey name of the desired survey to open the Survey Details page.
3. Select URL Links from the Reports drop-down menu and click **Go**.

Path: Active Surveys>survey name> URL Links

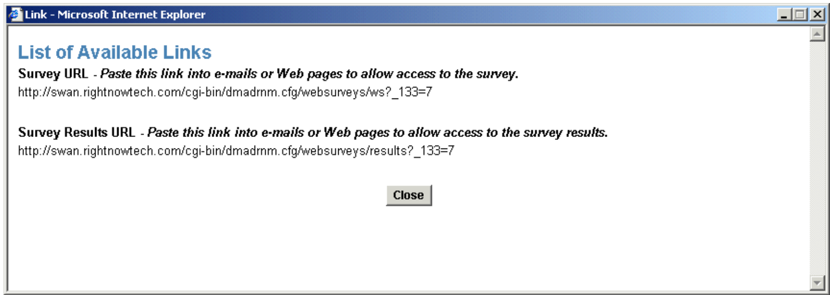


Figure 7-21: URL Links Report

Viewing Usage Statistics

You can view the RightNow Metrics usage statistics, including the daily and monthly totals for surveys sent and responses received. This enables you to track how you are using RightNow Metrics and can be useful for evaluating the load on your mail servers. You can also export the usage statistics in CSV format to further analyze the statistics in another application.

To view usage statistics:

Click **Usage** on the Active Surveys page.

Path: Active Surveys> **Usage**

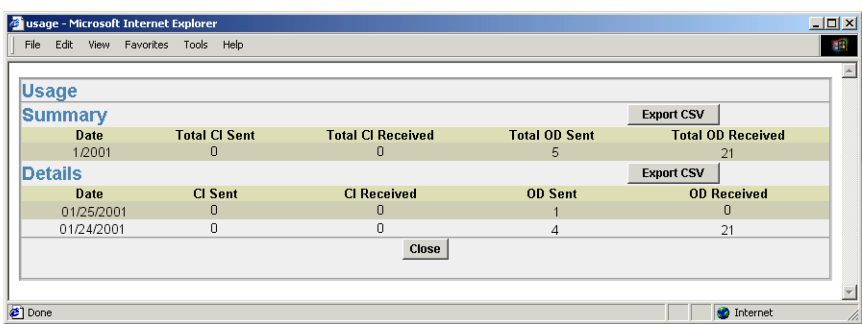


Figure 7-22: Usage Page

The Usage page displays statistics in two sections: Summary and Details. The Summary section shows the total number of surveys sent and responses received by month (a total of ten years is kept). The Details section displays the total number of surveys sent and responses received by day (a total of three months is kept).

Exporting Usage Statistics

You can also export the usage statistics in CSV format to further analyze the statistics in another application.

To export the usage statistics in CSV format:

1. From the Usage page, click Export CSV. Your Web browser's download feature will open a window.

2. If you are using Internet Explorer, click Save this file to disk, then click OK.

If you are using Netscape, click Save File... in the download window.

If you are using another Web browser, follow the appropriate steps to save the file.

3. Type the name of the file in the Save As window and click Save to download the file to your local machine or network.

Addresses

The Addresses console of RightNow Metrics provides instant access to your surveys' mailing list. No matter how large your list may be, you can quickly search for individual email addresses, exclude addresses from receiving surveys or links to surveys, and delete individual email addresses or groups of addresses. You can also access survey results associated with individual email addresses and obtain the results of a respondent's survey from the Addresses console.

This chapter describes the functions available with Addresses and includes procedures for maintaining and updating your mailing list.

Key Terms

You will want to become familiar with the following terms used throughout this chapter as you work with the Addresses console.

Opt In—Enables delivery of future surveys to the email address. The default setting when a survey is sent out. The participant is sent surveys.

Opt Out—Stops delivery of future surveys to the email address.

Participant—Any person sent a RightNow Metrics survey.

Respondent—Any participant who completes and submits a survey response.

Targeted Responses—Only the person who was sent a survey is allowed to respond. For more information, see "Launching an On-Demand Survey" on page 4-40.

Navigating the Addresses Page

The Addresses page displays a list of all email addresses that have been sent surveys, along with administrative survey data, including the date a survey was last sent to an email address, the total number of surveys sent to the address, the number of surveys received from the address, and the Opt Out status of the email address.

From the Addresses page you can search for specific email addresses using RightNow Metrics search function. You can type text strings (partial strings can be used) and search by user name, domain, or both.

You can also exclude email addresses from receiving surveys or links to surveys from RightNow Metrics. You can set each email address to either opt in (No in the Opt Out column), which means that surveys and links can be sent to this address or opt out (Yes in the Opt Out column), which means that surveys and links cannot be sent to this address. You can also delete email addresses from the database from this page.

Path: Active Surveys>Addresses

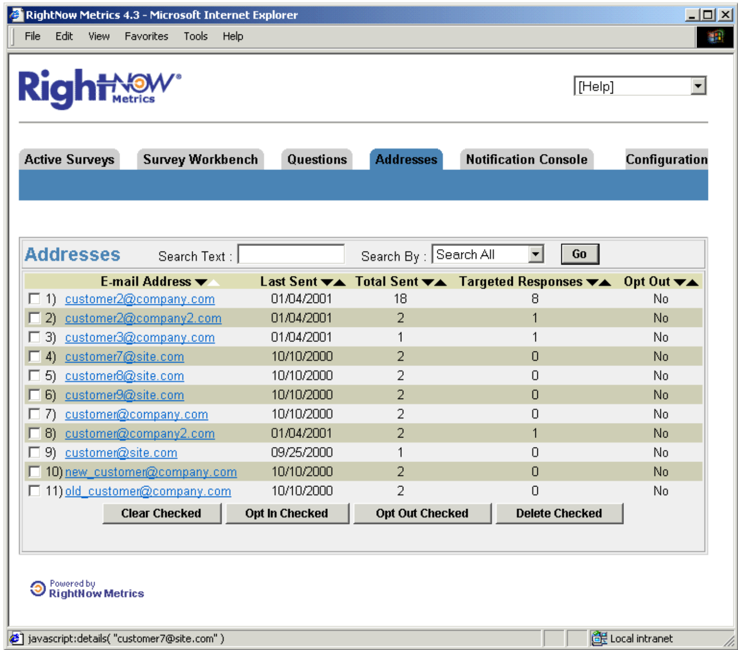


Figure 8-1: Addresses Page

Table 8-1 describes each button and field on the Addresses page.

Note: The Addresses page will not display email addresses that received a survey link using an outside email client.

The following table describes each field and button on the Addresses page.

Table 8-1: Addresses Page Field Descriptions

Field/Button	Descriptions
Search Text box	Type the text you want to search for in this box. For more information, refer to “Searching for Email Addresses” on page 8-4.
Search By	Select the section of the email address that you want to search for using this drop-down menu.
Search All	This criteria will search for the entire email address, both user name and domain, for the text specified in the text box.
Search User	This criteria will search for just the user name of the email address for the text specified in the text box.

Table 8-1: Addresses Page Field Descriptions (Continued)

Field/Button	Descriptions
Search Domain	This criteria will search for just the domain of the email address for the text specified in the text box.
Go	Click this button to execute the search using the text specified in the Search Text box and the Search By criteria.
Check Box	Click this box to select the email address located to the right. In order to commit an action (Delete, Opt Out, Opt In) on an email address, this box must be checked.
Email Address	This column displays all of the email addresses that have been sent surveys or survey links from RightNow Metrics.
Last Sent	This column displays the date when the most recent (last) survey was sent to this email address.
Total Sent	This column displays the total number of surveys or survey links sent to this email address.
Targeted Responses	This column displays the total number of survey responses received by RightNow Metrics from this email address. For information on targeted responses, see "Launching an On-Demand Survey" on page 4-40.
Opt Out	This column displays whether or not an email address can be sent surveys or survey links from RightNow Metrics. If this column is set to Yes, then no more surveys or survey links can be sent to this email address. If this column is set to No, then surveys and survey links can be sent to this address.
Clear Checked	Click this button to clear all boxes that are currently checked.
Opt In Checked	Click this button to set all of the email addresses that are currently checked to the opt in status. This will set the Opt Out column to No. Email addresses set to the opt in status can be sent surveys or survey links from RightNow Metrics.
Opt Out Checked	Click this button to set all of the email addresses that are currently checked to the opt out status. This will set the Opt Out column to Yes. Email addresses set to the opt out status cannot be sent surveys or survey links from RightNow Metrics.
Delete Checked	Click this button to delete all email addresses that are currently checked. This will permanently delete the checked email addresses from the database.

Searching for Email Addresses

RightNow Metrics search function allows you to quickly search for an email address or group of addresses that have been sent a survey or survey link from RightNow Metrics. You can type the text you want to search for in the Search Text box and then select whether to search by user name, domain, or both. Partial strings can also be used to search, so you can type as little or as much of the search string as you want or know.

For example, if you are searching for any user at domain “rightnow.com,” you could type “right” in the Search Text box and select Search User from the Search By drop-down menu**.** The results of this search would display any email address that contains the text “right,” including “user@rightnow.com” and “user@nextright.com.”

To search for email addresses that have been sent surveys:

1. From the Addresses page, type the text to search for in the Search Text box.

2. From the Search By drop-down menu, select the portion of the email address (Search All, Search User, or Search Domain) you want to search for. For a description of available options, refer to Table 8-1, “Addresses Page Field Descriptions,” on page 8-2.

3. Click 

to execute the search and display the results.

Opting In/Opting Out Email Addresses

With RightNow Metrics, you can easily manage your list of email addresses and track which addresses are excluded from receiving surveys. You can set email addresses to opt in or opt out status from the Addresses page and also delete email addresses from the database.

Note: If you use an email program to send your survey links, you will need to keep track of the email addresses you use. RightNow Metrics tracks only those email addresses that it sends surveys to.

Opt In/Opt Out Feature

The opt in/opt out feature allows you and your survey participants to restrict an email address from being sent a survey or survey link from RightNow Metrics. Each time RightNow Metrics sends out emails containing surveys or survey links, it checks the list of emails used in the survey against the list of email addresses in the database. If an email address is in the opt in status (No in the Opt Out column), a survey will be sent to this address. If an email address is in the opt out status (Yes in Opt Out column), a survey will not be sent to this address.

To opt in or opt out an email address or group of addresses:

1. From the Addresses page, search for an email address or addresses. See “Searching for Email Addresses” on page 8-4.
2. Select the check box(es) to the left of the email address(es) you want to modify.
3. To exclude email addresses from receiving surveys, click Opt Out Checked. This will set the Opt Out column to Yes for the selected email addresses.
4. To allow email addresses to receive surveys, click Opt In Checked. This will set the Opt Out column to No for the selected email addresses.
5. To delete email addresses from the database, click Delete Checked. This will delete the selected email addresses.

   Note: Once email addresses are deleted, RightNow Metrics can no longer restrict the sending of surveys to these addresses.
6. To clear all the boxes that are currently selected, click Clear Checked.

Participant Opt In/Opt Out

In addition to staff members setting an email address to the opt in or opt out status, RightNow Metrics allows survey participants to opt out of future surveys. Each of the three survey distribution methods contains an opt out feature that can be turned on or off. By default, these features are turned on.

Email Distribution Method

Surveys distributed by email will contain the following text:

```
** To OPT OUT of future surveys, reply to this  **
** message with 'REMOVE' in/on the subject line **
```

If a recipient replies to the e mail survey with ‘REMOVE’ in the subject line, their email address will be set to the opt out status (Yes in the Opt Out column). For instructions on enabling and disabling this feature when setting up survey characteristics, refer to Table 4-7, “Email Information Page Field Descriptions,” on page 4-34.

Email Link and Email HTML Distribution Methods

With Email Link and Email HTML distribution methods, the participant has the option to opt out of receiving future surveys by selecting a link that is included in the email. At the bottom of the survey is a link that allows the participant to opt out of future surveys:

Click here to be removed from our survey recipient list.

If the participant selects the link, their email address will be set to the opt out status (Yes in the Opt Out column). For instructions on enabling this feature when setting up survey characteristics, refer to Table 4-7, “Email Information Page Field Descriptions,” on page 4-34.

Viewing Customer Details and Survey Results

From the Customer Details page, you can quickly see all of the surveys that have been sent to a participant, including which survey was sent, the date the survey was sent, and the date the survey was received. You can also view and output the survey results for this email address.

To view customer details for a participant:

1. From the Addresses page, search for an email address (see “Searching for Email Addresses” on page 8-4).
2. Click an email address to open the Customer Details page.

***Path:** Active Surveys>Addresses>__email address__*

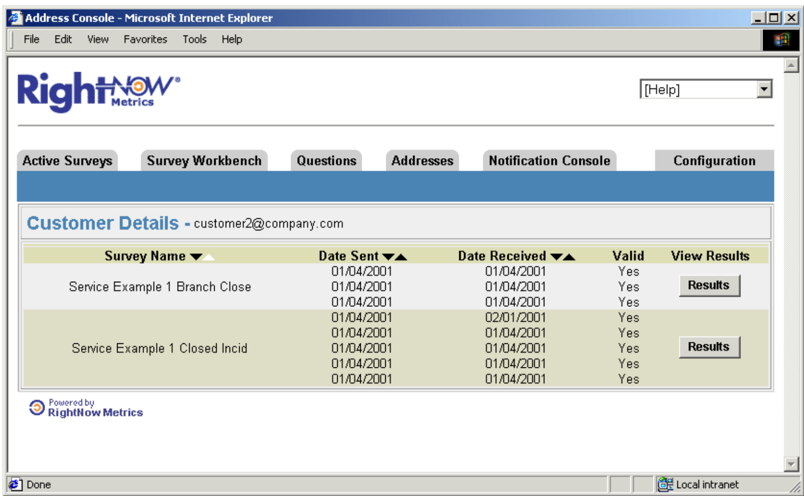


Figure 8-2: Customer Details Page

3. Click **Results** to open the Survey Results page to select the type of results you want to view or output.

Path: Active Surveys>Addresses>*<u>email address</u>*> Results

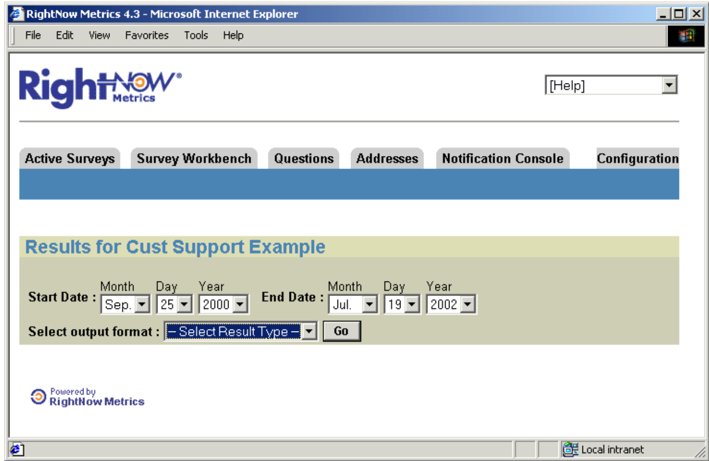


Figure 8-3: Survey Results Page

4. Select the Start Date and End Date from the drop-down menus for the period you want to view.

5. Select the output format for the survey results and click Go. The output will be specific to this email address.

Note: For information on the types of results formats available in RightNow Metrics, see Chapter 7, “Results.”

Notification Console

The Notification Console is your location for adding, editing, and deleting email notifications in RightNow Metrics. Email notifications define an email address or a group of email addresses to be notified when certain events occur. For example, you could create an email notification for the customer service manager of your organization, or a notification for all staff members in a department. The notification name is then used when launching a survey or in currently active surveys to notify the list of addresses when certain events occur. The email notification can then be used in a notification rule from the Active Surveys page, or in the Launching Survey wizard.

Changed

You must first create the email notification and then create the rule. However, since email notifications are used when creating notification rules for active surveys or when launching a survey, you should review “Notification Rules” on page 6-24 and “Launching a Survey” on page 4-28 to help you determine when and how you want to use email notifications. You can use email notifications in the following ways:

- Notify a list of email addresses when the score of a survey is above or below a certain number. This type of rule allows you to create a scoring system for each of your surveys and define notification rules for the survey’s overall score from each survey participant. For more information, refer to “Notification Rules and Scoring” on page 6-25.
- Notify a list of email addresses when a survey participant answers a question with a certain answer. This allows you to create a notification rule for range and multiple choice type questions. For more information, refer to “Notification Rules and Scoring” on page 6-25.
- Notify a list of email addresses when an error occurs launching the survey. This type of rule sends an email if there are problems with either the network, server, mailbox, or password when sending or receiving surveys. For more information, refer to “Notification Rules for Error Checking” on page 6-32.

This chapter describes the actions you can perform from the Notification Console and the pages accessible through this console.

Key Terms

As you begin to work with email notifications, you will encounter new terminology and features unique to the Notification Console. A list is provided here for your reference.

Email notification—An email alert sent to specified staff members as the result of a notification rule.

Notification Console—A console in RightNow Metrics for creating and modifying email addresses contained in email notifications.

Notification rule—A rule that defines under what criteria an email notification will be sent to staff members. Rules can be used with the scoring feature to notify staff members when an over-all survey score or individual question score is unusually high or low. Rules can also be used to notify staff members when there are problems with the network, server, mailbox, or password when sending or receiving surveys.

Scoring—A function for specifying scores for each answer choice of a question. You can send e-mail notifications to appropriate personnel if the score of a question or survey is abnormally high or low. This function allows you to track survey totals and percentages and run online tests.

Navigating the Notification Console

From the Notification Console, you can add, edit, and delete email notifications in RightNow Metrics. These notifications can be used in notification rules from the Active Surveys console. Notification rules can be constructed to notify your specified list of email addresses when a survey meets certain criteria. For example, you could create a notification rule to email your customer service manager when a customer replies “very unsatisfied” to a question regarding customer service. You can also create rules to email a notification when a survey scores above or below a certain number, or when a survey fails to launch due to an error. For more information, refer to “Notification Rules” on page 6-24.

Path: Notification Console

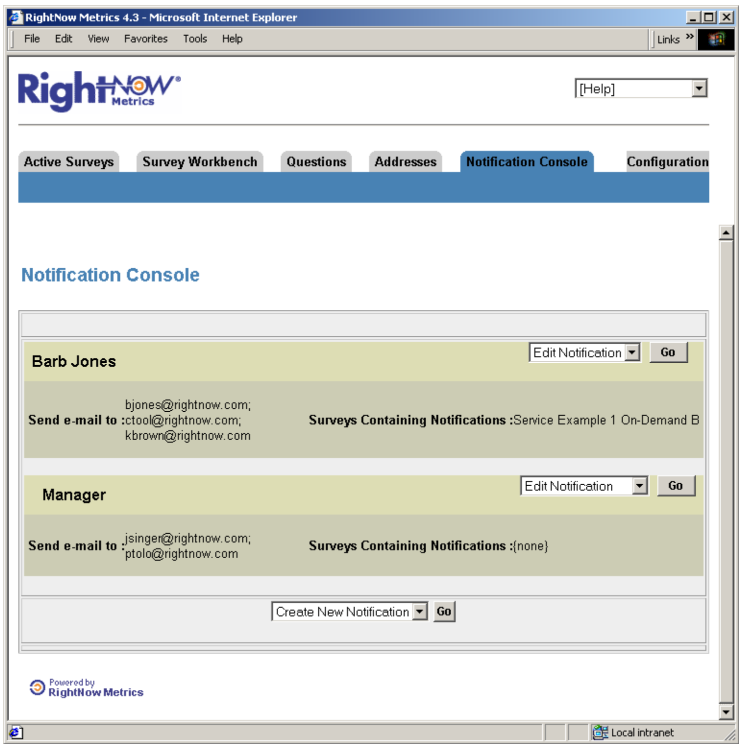


Figure 9-1: Notification Console

The Notification Console displays all current notifications in RightNow Metrics. Refer to the following table for a description of the fields and buttons on this page.

Table 9-1: Notification Console Field Descriptions

Field	Description
Edit Notification	Click this drop-down menu to select one of the following actions: Edit Notification or Delete Notification. Refer to “Modifying Email Notifications” on page 9-7.
Go	Click this button to perform the action selected in the Edit Notification drop-down menu.
Send e-mail to:	This column lists the email addresses specified in the notification.
Surveys Containing Notifications:	This column lists the surveys that currently use the notification in a notification rule.
Create New Notification	Select this option and click Go to create a new notification. Refer to “Creating Email Notifications” on page 9-5.

Creating Email Notifications

You can use the Notification Console to create lists of email addresses to be used in notification rules for launched surveys in RightNow Metrics. This section describes the procedure for creating an email notification.

To create notifications:

1. Click Notification Console.

Path: Notification Console

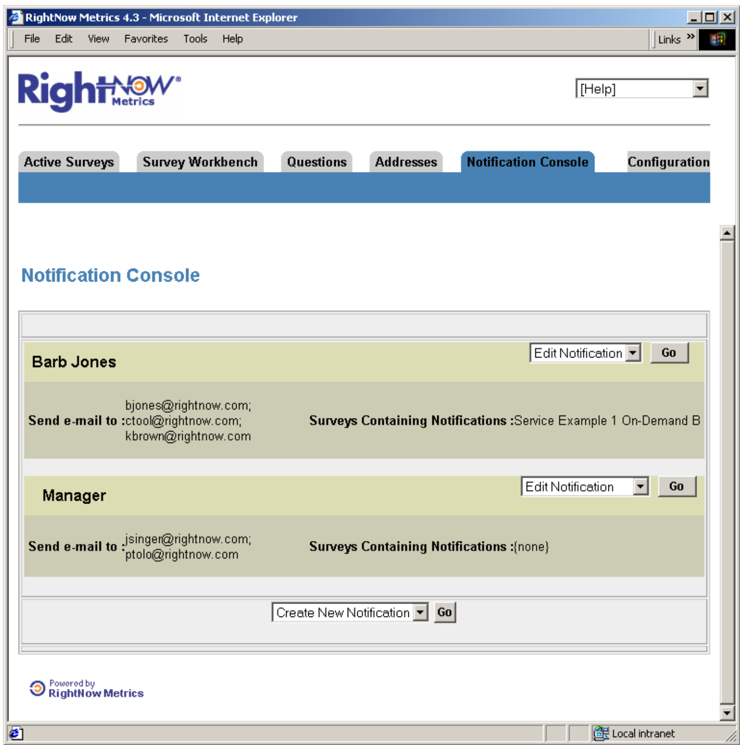


Figure 9-2: Notification Console

2. Select Create New Notification from the drop-down menu and click Go.

Path: Notification Console>Create New Notification

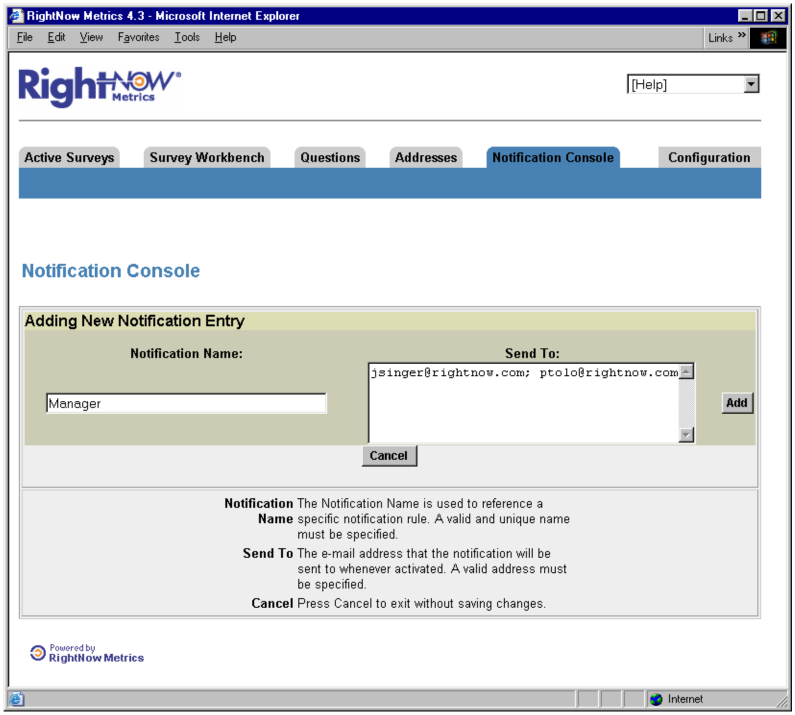


Figure 9-3: Notification Console

3. Type the name of the notification in the Notification Name field.

4. Type a valid email address for notification in the Send To field, or multiple addresses separated by semi-colons.

5. Click **Add** to save the notification.

The new notification entry is created and can now be used in notification rules.

Modifying Email Notifications

You can modify a notification to add or remove email addresses from the list. You can also delete a notification if it is no longer used or needed. This section contains procedures for editing or deleting a notification.

Note: You cannot delete a notification if it is currently being used in a survey. You must first modify that survey's notification rules to exclude the notification.

To edit a notification:

1. Select Edit Notification from the drop-down menu and click Go.

Path: Notification Console>Edit Notification

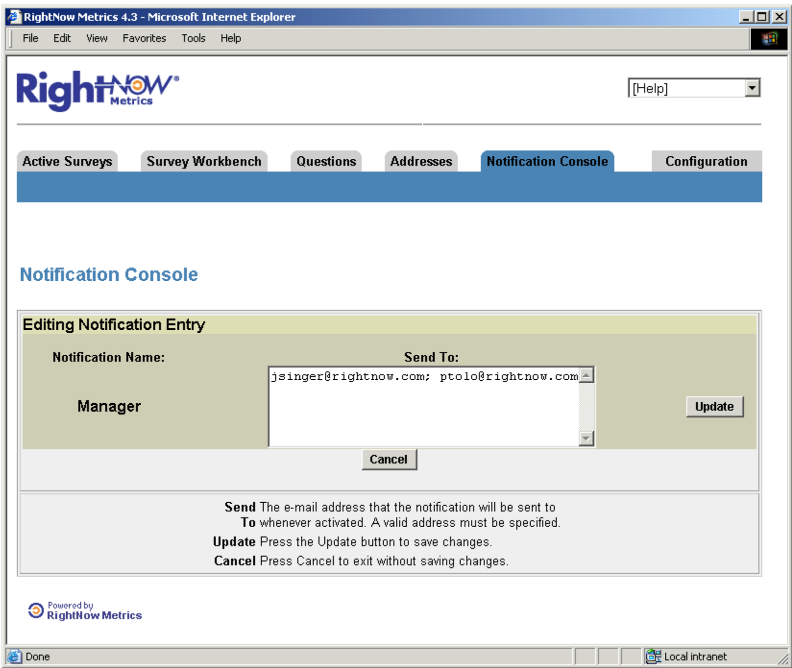


Figure 9-4: Notification Console—Editing Notification Entry

2. Make the necessary changes and click Update.

3. To cancel without saving your edits, click Cancel.

To delete a notification:

1. Select Delete Notification from the Edit Notification drop-down menu and click Go.

Path: Notification Console>Delete Notification

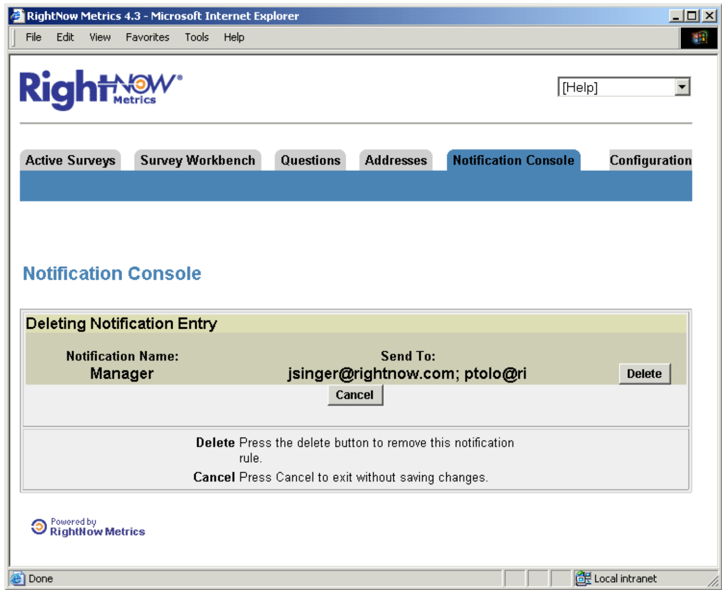


Figure 9-5: Notification Console—Deleting Notification Entry

2. Click Delete.

3. To cancel without deleting the notification, click Cancel.

Integration

Closed-Incident surveys in RightNow Metrics provide a powerful method of sending surveys in connection with an incident from eService Center or a ticket from another customer relationship management (CRM) software package. Because Closed-Incident surveys are automatically sent after an incident is solved, they provide an automated method for sending surveys to customers immediately after they have received services from your company. Using the sending rules feature, you can send specific surveys depending on the nature and type of the support request. This enables you to send tailored surveys that are pertinent to your customers.

To use the Closed-Incident survey feature, you must integrate RightNow Metrics with eService Center to receive an email message that will invoke the sending of a Closed-Incident survey. RightNow Metrics also has the ability to integrate with other CRM software packages.

New to RightNow Metrics is the ability to integrate the RightNow Metrics login with the staff account information in eService Center. This feature is available to organizations who have upgraded to eService Center version 5.5.1 and RightNow Metrics 4.3. When enabled, the RightNow Metrics Login page will require the user name and password of an eService Center staff member.

New

You can perform the following types of integration:

- **Integrate with eService Center sharing a database**—This method is typically used with earlier versions of eService Center (3.2.3 or lower) or to take advantage of the new staff integration function in eService Center 5.5.1. Even if you are using a version of eService Center between 4.0.0 and 5.5.0, you may want to consider merging databases to take advantage of future functionality.
- **Integrate with eService Center with separate databases**—This type of integration can be used by organizations who do not want to use the staff integration functionality, but simply want their eService Center to integrate with RightNow Metrics by sending trigger emails.
- **Integrate with another CRM package**—This type of integration is used when an outside application can send a formatted email to RightNow Metrics. You will need to configure your CRM package to send an email to RightNow Metrics in the correct format.

For general information about RightNow eService Center, refer to the eService Center documentation or visit our Web site at:

http://rightnow.com/products

Integrating with eService Center

The integration between eService Center and RightNow Metrics can be configured differently depending on the version of eService Center you are using and whether you want to integrate RightNow Metrics with the staff account information in eService Center. You have the choice of sharing a database between eService Center and RightNow Metrics, or simply passing trigger emails from eService Center to RightNow Metrics without sharing a database. In either case, when an incident is set to the Solved status type in eService Center, RightNow Metrics is triggered to send a Closed-Incident survey. Field information about the incident is compared to the sending rules to determine the Closed-Incident survey that will be sent. (For more information on sending rules, refer to “Applying Sending Rules to Closed-Incident Surveys” on page 6-32.)

One of the most important reasons to consider sharing a database is to be able to integrate RightNow Metrics with the eService Center staff account information. This will allow eService Center administrators to assign staff accounts permission to access RightNow Metrics. The staff members can than log in to RightNow Metrics using their eService Center user name and password. For more information, refer to “Integrating with eService Center Sharing a Database” on page 10-3.

If you do not want to use the staff account integration functionality, you are not required to merge your eService Center and RightNow Metrics databases. For more information, refer to “Integrating with eService Center Using Separate Databases” on page 10-12.

Integrating with eService Center Sharing a Database

New

This method of integration, while not necessary, is helpful because it allows you to perform a staff member integration. You can merge databases with any version of eService Center; however, having access to the staff account information requires an integration with eService Center version 5.5.1 or higher.

Integrating the staff account information will create staff accounts for RightNow Metrics. These staff members can use their eService Center user name and password to log in to RightNow Metrics, as shown in Figure 10-1.

Path: RightNow Metrics URL

Figure 10-1: RightNow Metrics Login—Integrated with eService Center

In order for eService Center staff members to successfully log in to RightNow Metrics, they must have the appropriate profile settings. There are two options in eService Center that allow access:

- **Metrics Administrator**—This setting allows a staff member with the current profile complete access to RightNow Metrics. This includes being able to view, access, and edit all launched and unlaunched surveys, regardless of which staff member created them.
- **Metrics User**—This setting allows a staff member with the current profile limited access to RightNow Metrics. Staff members with this profile are able to view, access, and edit only those surveys created by them.

As shown in Figure 10-2, these profile settings are available through the Profiles—Edit page.

Path: eService Center URL> >Staff Management>Profiles> Edit

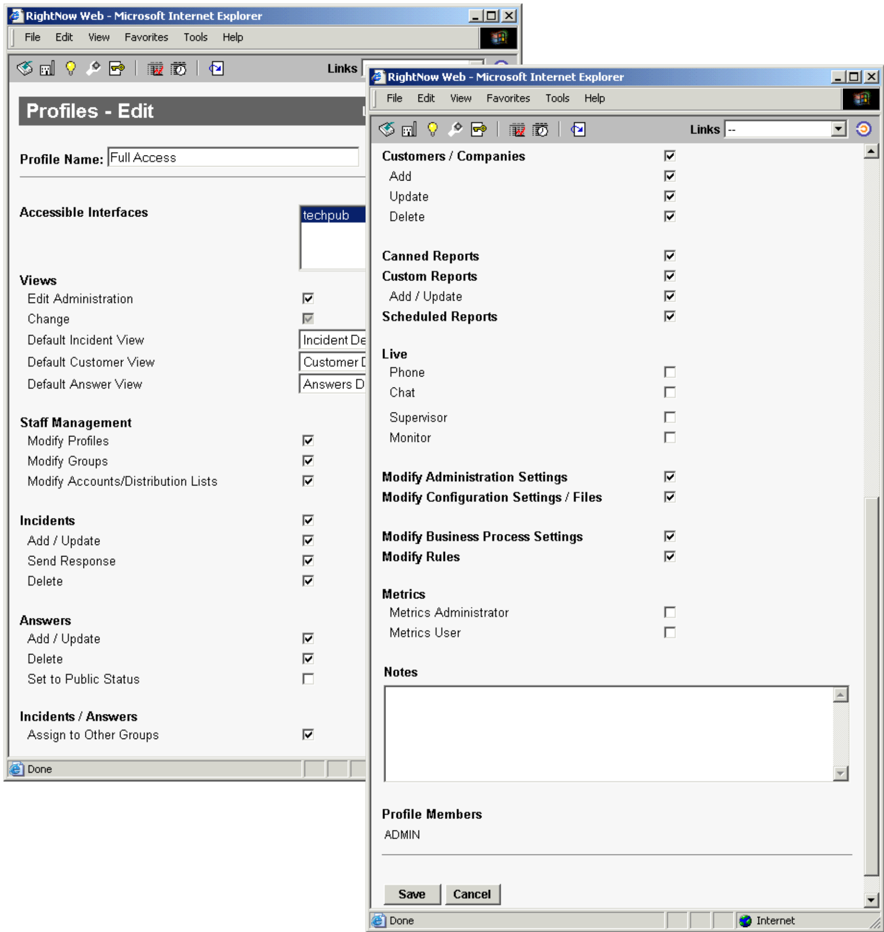


Figure 10-2: eService Center Profiles—Edit Page

You can edit the profile setting by selecting either Metrics Administrator or Metrics User on the Profiles—Edit page. All staff members assigned to this profile will be able to log in to RightNow Metrics using their eService Center user name and password. For more information on profiles, refer to the *RightNow eService Center 5.5 Administration Manual*.

Note: When performing the integration, RightNow Metrics will create a new staff member, group, and profile in RightNow Metrics. The profile, “METRICS,” has full access in eService Center, including Metrics Administration permissions. The staff account, also called “METRICS,” is assigned to this new profile, as well as the new group, “METRICS.”

Steps to Perform an eService Center Integration

You can perform the following steps to successfully merge your eService Center and RightNow Metrics databases. These steps will assist you in moving your current RightNow Metrics database into an eService Center database. You will configure eService Center to send emails to RightNow Metrics that trigger Closed-Incident surveys. In addition, the following configuration setting will be enabled in the process:

RightNow Metrics>General>RightNow Web>RNW_INTEGRATION

This setting enables the staff account integration feature described in the preceding section.

Note: Hosted customers should contact their RightNow Technologies customer service representative to perform an integration.

Step 1: Export your data

Since you will be redirecting RightNow Metrics to your eService Center database, any existing data in your RightNow Metrics database will not be automatically transferred. You will need to export your database to a temporary location so you can import it later into your new shared database. This is accomplished using the utility *gexport*. For specific instructions on using *gexport*, refer to Chapter 11, “Utilities.”

Note: You do not need to perform this step if you have no existing data in RightNow Metrics.

To export your data:

1. Create a temporary file to store your RightNow Metrics table.
2. Navigate to the following directory depending on your operating system:

   UNIX:

   ```
   /usr/local/rnt/rnm/bin
   ```

   Windows NT/2000:

   ```
   c:\Program Files\Right Now Technologies\Right Now Metrics\bin
   ```

3. Export your database using the following syntax:

   ```
   gexport -d <path_name> <your_interface>
   ```

   A CSV and an IMP file for all your RightNow Metrics tables will be exported to your temporary file located at <path_name>.

Step 2: Redirect your database

In this step, you will drop your current database from RightNow Metrics and redirect it to your eService Center database. You will then need to create tables for RightNow Metrics using the utility *rnm_dbaudit*. While performing this step, RightNow Metrics will enable the staff account integration feature (enable the RightNow Metrics>General>RightNow Web> RNW_INTEGRATION configuration setting) provided you have RightNow Metrics version 4.3 and eService Center version 5.5.1 or higher. It will also create a new staff member, group, and profile in RightNow Metrics. The profile, “METRICS,” has full access in eService Center, including Metrics Administration permissions. The staff account, also called “METRICS,” is assigned to this new profile, as well as the new group, “METRICS.” This account can then log in to RightNow Metrics using the user name, “METRICSADMIN.” The password is blank by default.

To redirect your database:

1. Log in to RightNow Metrics using your password specified in SURV_ADMIN_PASSWD.
2. Click  to open the RightNow Metrics General Configuration Menu.

Path: Metrics Login Page>Configuration

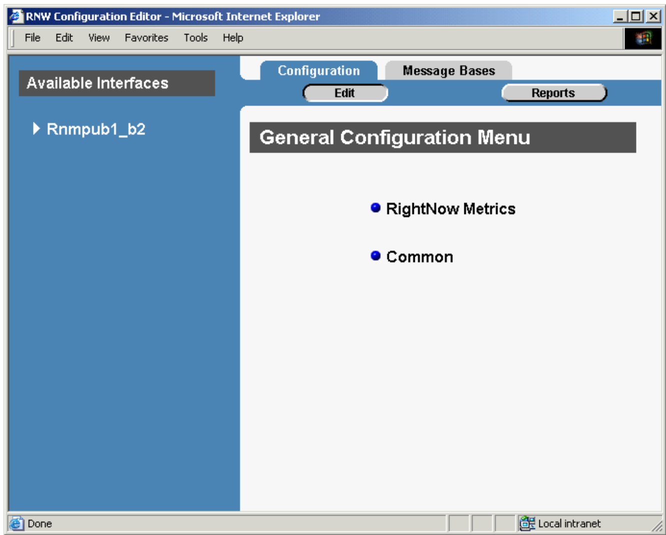


Figure 10-3: RightNow Metrics Configuration Editor

3. Click Common.
4. Under Database, modify the following settings depending on your type of database:

Oracle:

DB_LOGIN
DB_PASSWD
ORACLE_HOME
ORACLE_SID
ORACLE_SERVICE
ORACLE_DATA_TS
ORACLE_INDEX_TS

MS-SQL:

DB_LOGIN
DB_PASSWD
ODBC_DSN

MySQL:

DB_LOGIN

DB_PASSWD

DB_NAME

SERVER_NAME (remote DBMS only)

Note: You may not have a database login or password with MySQL.

These settings should be changed to correspond to your eService Center database settings. If you are unsure of these specific settings, consult your eService Center database administrator for this information.

You must now create the RightNow Metrics tables in your eService Center database, using the utility *rnm_dbaudit*. For specific instructions on running utilities, refer to Chapter 11, “Utilities.”

5. Navigate to the following directory depending on your operating system:

UNIX:

```
/usr/local/rnt/rnm/bin
```

Windows NT/2000:

```
c:\Program Files\Right Now Technologies\Right Now Metrics\bin
```

6. Create your database tables using the following syntax:

```
rnm_dbaudit <your_interface>
```

You must now log in to RightNow Metrics using the user name “METRICSADMIN.” By default, the password is blank.

Step 3: Import your data

If you exported your RightNow Metrics data in step 1, you will need to import it into your eService Center database. This is accomplished using the utility *gimport*. For specific instructions on using *gimport*, refer to Chapter 11, “Utilities.”

Note: You do not need to perform this step if you did not perform step 1.

To import your data:

1. Navigate to the following directory depending on your operating system:

UNIX:

```
/usr/local/rnt/rnm/bin
```

Windows NT/2000:

```
c:\Program Files\Right Now Technologies\Right Now Metrics\bin
```

2. Import your database using the following syntax:

```
gimport -d <path_name> <your_interface>
```

The CSV and IMP files located in the temporary file (<path_name>) you created in step 1 will be imported into your eService Center database.

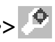
Step 4: Configure eService Center and RightNow Metrics

Your next step is to configure eService Center and RightNow Metrics to communicate via trigger emails. You need to make sure that several eService Center and RightNow Metrics configuration settings are properly set, as well as create a mailbox in eService Center. After performing this step, RightNow Metrics will be able to send Closed-Incident surveys after an incident is marked solved in eService Center.

Note: Some steps in the following procedure may have already been performed in your eService Center installation, depending on whether your eService Center administrator configured email management.

To configure eService Center and RightNow Metrics:

1. Log in to eService Center. For specific procedures, refer to the *RightNow eService Center 5.5 Administration Manual.*
2. From the Management and Configuration page, click Settings under Configuration Editor.

Path: Administration Login Page>  ***>Settings***

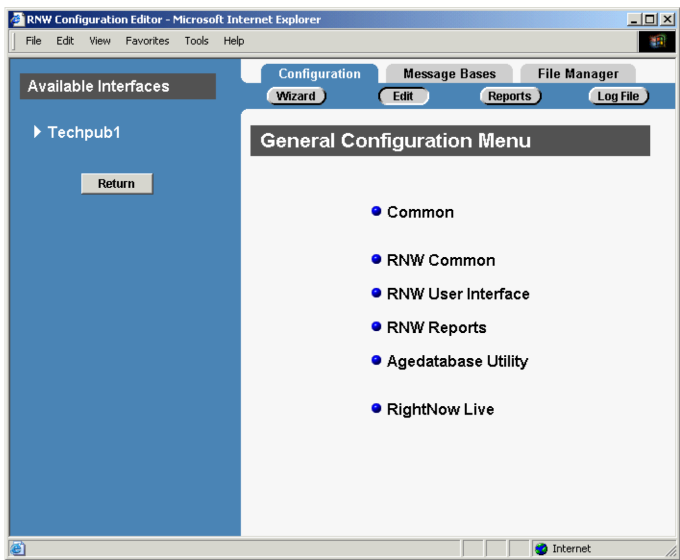


Figure 10-4: eService Center Configuration Editor

Note: If you are currently using eService Center, some of these settings may already be configured.

3. Click Common to open the Common Configuration Settings menu.

4. Click the following settings, customize the setting, and click Update after customizing each setting.

Table 10-1: eService Center Common Configuration Settings for Integration

Configuration Setting	Value
General>Outgoing Email>OE_SMTP_SERVER	Type the name of your outgoing mail server.
General>Outgoing Email>OE_WEB_SERVER	Type the name of you Web server.

5. Click Commit and Exit to save the values and return to the General Configuration Menu.
6. Click RNW Common to open the RNW Common Configuration Settings menu.
7. Click the following settings, customize the setting, and click Update after customizing each setting.

Table 10-2: eService Center RNW Common Configuration Settings for Integration

Configuration Setting	Value
Modules>RightNow Email>EGW_ENABLED	Click Yes to enable the email management feature.
Modules>RightNow Metrics Integration>RNM_ENABLED	Click Yes to enable the integration feature that sends trigger emails from eService Center to RightNow Metrics when an incident is set to the Solved status.
Modules>RightNow Metrics Integration>RNM_EMAIL_INTERFACE	Type the email address where eService Center sends trigger emails. **Note:** This email address must be used in the Reply To setting of your Closed-Incident surveys. The RightNow Metrics utility *pollster* will access this mailbox to parse the incoming mail for trigger emails.

8. Click Commit and Exit to save the values and return to the General Configuration Menu.
9. Click RNW User Interface to open the RNW User Interface Configuration Settings menu.

10. Click the following setting, customize the setting, and click **Update**.

Table 10-3: eService Center RNW User Interface Configuration Settings for Integration

Configuration Setting	Value
Tool Bar>Links>TBAR_METRICS_URL	Type the URL of your RightNow Metrics site. You can enter the URL of any main page within RightNow Metrics (for example, Active Surveys, Survey Workbench, Addresses, Notification Console, or Questions). From the eService Center administration pages, you can the open RightNow Metrics from the Links drop-down menu.

11. Click **Commit and Exit** to save the value and return to the General Configuration Menu.
12. Click **Return** to return to the Management and Configuration page.
13. Click Mailboxes under Email.
14. Add at least one mailbox to your eService Center. For specific procedures on adding a mailbox, refer to the *RightNow eService Center Administration Manual*.

You have finished configuring eService Center. Now, you will configure RightNow Metrics.

15. Log in to RightNow Metrics.
16. Click **Configuration** to open the General Configuration Menu (refer to Figure 10-3, “RightNow Metrics Configuration Editor,” on page 10-6).
17. Click RightNow Metrics to open the RightNow Metrics General Configuration Menu.
18. Click the following setting, customize the setting, and click **Update**.

Table 10-4: RightNow Metrics Configuration Settings for Integration

Configuration Setting	Value
General>RightNow Web>RNW_URL	Type the URL of the eService Center interface with which you are integrating. This will display a link, Go to RightNow eService Center, in RightNow Metrics that will link to the Login page of eService Center.

19. Click **Commit and Exit** to save the values and return to the General Configuration Menu.
20. Click **Close Configuration** to close the Configuration Editor.

You have now completely configured eService Center to send trigger emails to RightNow Metrics. RightNow Metrics and eService Center have also been customized to show links to the other product for quick access.

Step 5: Create a Closed-Incident survey

To complete the integration process, you need to configure RightNow Metrics to send Closed-Incident surveys. You will first need to create and launch a Closed-Incident survey. For more information, refer to Chapter 6, “Active Surveys.”

Note: The Reply To setting of the Closed-Incident surveys must be properly configured when you launch each Closed-Incident survey. If you are integrating with eService Center, this setting must be the same email address as you specified in the configuration setting, RNW Common>Modules>RightNow Metrics Integration>RNM_EMAIL_INTERFACE. If you are integrating with another CRM package, the Reply To email address must be the same as the email address where trigger emails are sent.

You will also need to create sending rules for the Closed-Incident surveys. The sending rules feature in RightNow Metrics enables you to send Closed-Incident surveys that are specific to the nature and type of eService Center incidents or CRM tickets that customers submit to your organization. You specify the criteria (in the form of sending rules) that determine when each Closed-Incident survey will be sent. For more information, refer to “Applying Sending Rules to Closed-Incident Surveys” on page 6-32.

Note: You must have sending rules specified for Closed-Incident surveys to be sent.

Once you have integrated with eService Center, created Closed-Incident surveys, and specified sending rules, eService Center will send trigger emails each time an incident is set to a Solved status type (manually or by the system) to the mailbox specified in the eService Center configuration setting:

RNW Common>Modules>RightNow Metrics Integration>RNM_EMAIL_INTERFACE

The *pollster* utility of RightNow Metrics will access this mailbox (specified in the Reply To setting to the Closed-Incident survey) and parse the email for the incident information, including product, sub-product, category, sub-category, staff, group, and contact information. This information will be compared to the sending rules to determine which Closed-Incident survey to send. If a match is made or there is a DEFAULT survey, a Closed-Incident survey will be sent to the email address from the original eService Center incident. This survey will be sent in accordance with the Percent to Mail and Send Delay settings. For more information about the *pollster* utility, refer to Chapter 11, “Utilities.”

Integrating with eService Center Using Separate Databases

This method of integration is implemented when you do not want to use the eService Center staff account information in RightNow Metrics. You can also perform this type of integration when you are integrating RightNow Metrics with a version of eService Center earlier than 5.5.1. In this method, RightNow Metrics has its own database operating independently of eService Center.

Note: Even if you do not plan on using the new staff account integration functionality, we recommend that you consider merging your eService Center and RightNow Metrics databases to take advantage of future functionality and enhancements.

When eService Center and RightNow Metrics do not share a database, you cannot enable the staff account integration (described in "Integrating with eService Center Sharing a Database" on page 10-3). Therefore, you will continue to log in to RightNow Metrics using only the password specified in RightNow Metrics>General>Survey Settings>SURV_ADMIN_PASSWD.

When RightNow Metrics is integrated with eService Center using this method, a trigger email is still sent to RightNow Metrics each time an incident is set to the Solved status type. RightNow Metrics automatically reads this email for information about the incident, including the customer's email address and the incident's subject, product, sub-product, category, sub-category, staff assignment, group assignment, and reference number. The information is then compared to the sending rules for each Closed-Incident survey to determine which survey will be sent. (For more information on sending rules, refer to "Applying Sending Rules to Closed-Incident Surveys" on page 6-32.)

To enable this integration with eService Center, you should perform **only** steps 4 and 5 in "Steps to Perform an eService Center Integration" on page 10-5. After performing these steps, RightNow Metrics will be successfully integrated with eService Center using separate databases.

Integrating RightNow Metrics with CRM Software

RightNow Metrics has the capability to be integrated with CRM software packages by accepting an email to trigger a Closed-Incident survey. This allows you to enable Closed-Incident surveys in conjunction with actions from your CRM software.

Note: For more information on survey settings, refer to Chapter 6, "Active Surveys."

The *pollster* utility in RightNow Metrics will access the mailbox specified in the Reply To setting to the Closed-Incident survey and parse the email for the field information, including product, sub-product, category, sub-category, staff, group, and contact information. This information will be compared to the sending rules to determine which Closed-Incident survey to send. If a match is made or there is a DEFAULT survey, a Closed-Incident survey will be sent to the email address in the field information. (For more information on sending rules, refer to "Applying Sending Rules to Closed-Incident Surveys" on page 6-32.) This survey will be sent in accordance with the Percent to Mail and Send Delay settings.

Note: You must have sending rules specified for Closed-Incident surveys to be sent.

The trigger email must be sent to the mailbox used by RightNow Metrics to collect trigger emails and survey responses.

To integrate with CRM software, you must create an event in your CRM software that sends an email message in the proper format. The format for the remote messages requesting a Closed-Incident survey is as follows:

```
Subject: [id#username@company.com;0;0] Survey Title
TITLE: incident title;
PRODUCT: metrics;
SUBPRODUCT: CI request feature;
CATEGORY: software;
SUBCATEGORY: updates;
ASSIGNED: jon doe;
GROUP: development;
REF_NO: 0000901-000001
CONTACT: Jim Smith
```

Subject—The subject line consists of information in brackets and an optional survey title. An email subject may follow the closing bracket, but is not necessary and will be discarded by the *pollster* utility. Within the brackets, there are three fields separated by semicolons:

- The first field is the email address of the survey recipient. The email must begin with `id#` followed by the email address of the survey recipient's mailbox. This syntax must be used for the email address to be properly identified by the *pollster* utility. (For more information on *pollster*, refer to Chapter 11, "Utilities.")
- The second field is the response identification field. A zero in this field indicates to the *pollster* utility that this email is a Closed-Incident survey trigger rather than a response to a survey. There is a semi-colon separator following the zero.

- The last field is a security parity check value which ensures that RightNow Metrics will not accept email messages from unknown sources. This is followed by a closing bracket.

  Note: This field is not currently enabled.

Body Fields—The body of the email message is optional. Keyword fields can be specified in the message body to provide data about the incident and to determine the content of the survey. If included, the keyword information is stored in the RightNow Metrics database.

All keywords must be upper case and include a colon at the end. This helps differentiate keywords from identical text. The *pollster* utility locates the keyword and extracts all the text for the field up to a semi-colon, or carriage return. The semi-colon allows for more than one keyword per line. Any other text or comments in the email body that are not in this format are ignored. The contact field should be in the format <first name> <last name>. This information is used to personalize the greeting in your Closed-Incident survey.

To complete the integration, you must create Closed-Incident surveys and sending rules. For more information, refer to “Applying Sending Rules to Closed-Incident Surveys” on page 6-32.

Utilities

RightNow Metrics utilities are used to perform maintenance on the system and its components, including sending and receiving surveys, processing surveys, editing and changing configuration settings and messages base text strings from the command line, and performing maintenance on the database.

Becoming familiar with the following terms will help you to understand this chapter.

Key Terms

At command—Windows command used to schedule the automatic running of processes, including utilities.

Crontab—UNIX command used to schedule the automatic running of processes, including utilities.

Crontabfile—A file that contains and stores the scheduled processes.

Scheduling RightNow Metrics Utilities

You can schedule the utilities to run automatically. This involves setting up a schedule file that is interpreted by another program that executes the intended commands. We recommend that the *pollster* utility be scheduled to run automatically because it sends, receives, and processes surveys and email for RightNow Metrics.

Specific instructions for scheduling utilities depend on the platform used. For UNIX installations, refer to "Scheduling for UNIX" on page 11-2. For Windows NT/2000 installations, refer to "Scheduling for Windows NT/2000" on page 11-3.

Scheduling for UNIX

For the utilities to be automatically executed, you must install the RightNow Metrics crontabfile. This file is responsible for running utilities in the background. This procedure takes your current crontab file and saves it to a temporary file. Then, the crontab entries are appended to the temporary file. Finally, the temporary file is used as the system's crontab file.

To add RightNow Metrics utility crontab entries to your crontab file:

1. Log in as a user that has permissions to change crontab files.

2. Change directories to the location where you executed the RightNow Metrics installer. For more information, refer to *RightNow Metrics 4.3 Installation Guide.*

This directory should contain the file *crontabfile.*

```
*/3 * * * * $RNM_BIN_DIR/pollster <your_interface> >/dev/null
```

Where:

$RNM_BIN_DIR = directory where your utilities are stored

$RNM_BIN_DIR/pollster <your_interface> >/dev/null = command to execute

*/3 * * * * = times to execute the command, order is minutes, hours, day of month, month, and day of week. * means any acceptable value. */3 means run every third minute.

Note: /usr/local/rnt/rnm/bin is the default location for utilities.

3. Add or edit appropriate file entries and save the file.

4. Enter the following command:

```
crontab -l > /tmp/cron.out
```

This saves the current crontab entries to a temporary file.

Note: If there is no crontab file for the user, an error will occur.

5. Enter the following command:

```
cat crontabfile >> /tmp/cron.out
```

This appends the new crontab entries to the temporary file.

6. Enter the following command:

```
crontab /tmp/cron.out
```

This adds the new crontab entries to the system crontab file.

You can edit the crontab file once you have added the utility entries. Do this if you want to change the times the utilities are executed or change the utility arguments.

To change the execution time of the utilities:

1. Log in as the user that added the crontab entries.
2. From the command line enter:

   ```
   crontab -e
   ```

3. Edit the file by changing the arguments.

Scheduling for Windows NT/2000

During the installation procedure for RightNow Metrics, you have the option to automatically schedule the utilities during the installation or wait to schedule the utilities until another time. The *schedule.bat* file is a batch file that schedules processes into Scheduled Tasks in the form of at commands. If you select the automatic option, RightNow Metrics automatically adds your *schedule.bat* file to the Task Scheduler. If you do not select to have the utilities automatically scheduled, you must manually execute the *schedule.bat* file to add it to Scheduled Tasks.

The *schedule.bat* file does not run the utilities; it only loads the commands into the Scheduled Tasks. The Task Scheduler reads and executes the at commands.

Note: Make sure the Task Scheduler is running.

To check the Task Scheduler:

Windows NT:

1. Select the Start menu > Settings > Control Panel > Services > Task Scheduler.
2. If necessary, start the Task Scheduler.

Windows 2000:

1. Select the Start menu > Settings > Control Panel > Administrative Tools > Services >Task Scheduler.
2. If necessary, start the Task Scheduler.

You can schedule the utilities by running the *schedule.bat* file. The Task Scheduler must be running when you run *schedule.bat*.

To run schedule.bat manually:

1. Using Windows Explorer, go to C:\InetPub\scripts\<your_interface>.cfg.
2. Double-click *schedule.bat*.

AT Commands Scheduled for eService Center

AT commands are scheduled for the utilities. The AT command consists of the following components:

- Time that the utility runs each day
- Days that the utility runs
- Location and the executable file for the utility

- Interface name

An example of an AT command in *schedule.bat* is provided below:

at 2:35 /every:m,t,w,th,f,s,su "C:\Program Files\Right Now Technologies\Right Now Metrics\bin\pollster.exe" metrics

Troubleshooting Utilities

This section describes the actions you can take to solve problems with RightNow Metrics utilities. The following list describes the options you have in troubleshooting utilities:

- View your error log in ../<your_interface>.cfg
- Create a trace file that outputs actions the utilities performed
- Use the error codes to identify your issue

An error log has been added to help you quickly identify a problem when one happens. Additionally, you can use the exit codes to identify your problem. Oftentimes, the issue is outside of RightNow Metrics, and the exit codes can indicate where the problem is. Error codes eliminate or reduce time spent debugging and trying different scenarios to understand what went wrong. These codes can be used by advanced users who understand the commands and the resulting error code that is generated by the action.

Viewing the Error Log

Errors that are generated are stored in a file you can view. Viewing this file may help you solve your problem.

To view the error log:

1. From the command line, change directories to:

   UNIX:

   ```
   /home/httpd/cgi-bin/<your_interface>.cfg
   ```

   Windows NT/2000:

   ```
   \inetpub\scripts\<your_interface>.cfg
   ```

2. Open the *log* file in a text editor to view errors.

Creating Debugging Trace Output Files

You can troubleshoot utilities, PHP pages, or RightNow Metrics executables by running an internal debugging program that tracks and outputs a program's status as it executes. This is called a trace output file that contains statements that help you understand what the program was doing when it failed. To use this function, you must first turn it on. Once on, each time the utility executes, a new trace output file is created. These files are also useful to attach to your incident if you have questions for RightNow Technologies Customer Support.

Creating a Trace Output File for Utilities

You will need to create a trace output file for utilities if you cannot send or receive surveys. For example, if you are sending 100 surveys but only 10 surveys were actually sent, then you would want to create a trace output file for utilities. Another example would be if Closed-Incident surveys are not getting sent.

To create a trace output file for utilities:

1. As root, change directories to:

UNIX:

```
/usr/local/rnt/rnm/bin
```

Windows NT/2000:

```
C:\Program Files\Right Now Technoligies\Right Now Metrics\bin
```

2. Enter the following from the command line:

```
echo ALL > tr.<utility_name>
```

For example, `echo ALL > tr.pollster`

3. Execute the utility manually. Refer to "Accessing and Running Utilities Manually" on page 11-8.

4. The trace output file will be located in the same directory. The filename will be of the format *<utility_name>###.tr*. For example, *pollster369.tr*.

5. Delete the *tr.<utility_name>* file.

6. View the trace output file in a text editor to debug your issue. If necessary, submit an assistance request to our Customer Service department and attach this trace file.

Caution! When you are finished troubleshooting, be sure to remove the *tr.<utility_name>* **file. If this file is left in place, RightNow Metrics will continue to create trace output files in the log directory, eventually filling up all drive space.**

You will want to create a trace output file for the PHP pages of your interface if you are having problems with the message bases, graphical reports pages, or the Configuration Editor:

1. As root, change directories to:

UNIX:

```
/home/httpd/cgi-bin/<your_interface>.cfg
```

Windows NT/2000:

```
C:\inetpub\scripts\<your_interface>.cfg
```

2. In a Web browser, prepare your interface so that the next click or action to perform will cause the error.

3. Enter the following at the command line:

```
echo ALL TIME> tr.php
```

This command will create a file *tr.php* in the log directory. The *tr.php* file will cause standard output to be sent to a trace output file in the log directory. The trace output file will be in the format *php####.tr* (for example, *php8765.tr*).

4. In the Web browser, execute the click or action to cause the error.
5. Delete *tr.php*.
6. View the trace output file in a text editor to debug your issue. If necessary, submit an assistance request to our Customer Service department and attach this trace output file to the Ask a Question request. Please compress or zip these files before attaching them to the assistance request.

Caution! When you are finished troubleshooting, be sure to remove the *tr.php* file. If this file is left in place, RightNow Metrics will continue to create trace output files in the log directory, eventually filling up all drive space.

If your customers have problems submitting the answered survey or you have problems previewing the survey you will need to troubleshoot the websurveys executable. If you have problems creating, editing, or maintaining your survey, you will want to troubleshoot the metrics executable.

To create a trace file for Web surveys or the administration pages:

1. As root, change directories to:

   UNIX:

   ```
   http://<server_name>/cgi-bin/<your_interface>.cfg/
   websurveys?...
   ```

   ```
   http://<server_name>/cgi-bin/<your_interface>.cfg/metrics?...
   ```

   Windows NT/2000:

   ```
   http:\\<server_name>\scripts\<your_interface>.cfg\websurveys?
   ...
   ```

   ```
   http:\\<server_name>\scripts\<your_interface>.cfg\metrics?...
   ```

2. In a Web browser, prepare your interface so that the next click or action to perform will cause the error.
3. Enter the following at the command line:

   ```
   echo ALL TIME> tr.metrics or echo ALL TIME> tr.websurveys
   ```

   This command will create a file *tr.rightnow* in the log directory. The *tr.rightnow* file will cause standard output to be sent to a trace output file in the log directory. The trace output file will be in the format *rightnow####.tr* (for example, *rightnow8765.tr*).

4. In the Web browser, execute the click or action to cause the error.
5. Delete the *`tr.metrics`* or the *`tr.websurveys`* file.
6. View the trace output file in a text editor to debug your issue. If you need to, submit an assistance request to our Customer Service department and attach this trace file to the Ask a Question request. Please compress or zip these files before attaching them to the assistance request.

Caution! When you are finished troubleshooting, be sure to remove the *tr.metrics* and *tr.websurvyes* files. If these files are left in place, RightNow Metrics will continue to create trace output files in the log directory, eventually filling up all drive space.

Accessing and Running Utilities Manually

The RightNow Metrics utilities are located in the following directories:

UNIX:

```
/usr/local/rnt/rnm/bin
```

To run a program once in this directory, type `./` before the executable.

Example:

```
./pollster <your_interface>
```

Windows NT/2000:

```
c:\Program Files\Right Now Technologies\Right Now Metrics\bin
```

pollster

The utility *pollster* processes email and surveys for RightNow Metrics. The utility sends out all three types of email surveys and processes email text-based survey responses. It retrieves replies to email surveys and processes the responses.

Pollster handles Closed-Incident surveys by sending them out once an incident is closed in RightNow Metrics and *pollster* will process any responses once it is run again.

Syntax:

```
pollster [-h] [-v] [-i] [-l] [-d] [-c] <your_interface>
```

Where:

-h = Display this usage information

-v = Display version information

-i = Ignore - Do not delete email messages / Do not save responses

-l = Leave Files - Do not delete temporary files

-d = Delete Questions - Delete unused questions from DB

-c = Clean Mailbox - Delete all messages in mailbox

New

-s = Send Out Surveys Only (new)

-r = Process Mailbox Only (new)

You can also schedule pollster -c to clean out mailboxes. Recommended use of this is to schedule pollster -c once per week *after* the regular *pollster* utility has run.

rnm_dbaudit

This executable automatically upgrades the RightNow Metrics tables in your database from previous versions of RightNow Metrics to the current version. On new installations, the *rnm_dbaudit* utility automatically creates the necessary tables in your RightNow Metrics database. You can also run it to re-create lost or damaged tables.

The schema of the database tables is displayed using one of the arguments and the schema of a single table is displayed with another argument.

You can populate the RightNow Metrics database with example data by running this utility. This sample data gives you a chance to see how information is displayed and used within RightNow Metrics. The data can also be used for training.

Syntax:

```
rnm_dbaudit [-h] [-v] [-s table] [-S] [-u] [-c] [-e]
interface
```

Where:

-h = Display this usage information

-v = Display version information

-s = Shows the schema for ’table’

-S = Shows the schema for all tables

-u = Upgrades the database

-c = Creates the database

-e = Creates example database

interface = Name of interface to operate on (corresponds to the name of a .cfg directory without the .cfg suffix)

Examples:

```
rnm_dbaudit -u <interface>
```

This example upgrades or restores the database tables of the interface to the latest version.

```
rnm_dbaudit -S <interface>
```

This example shows the database schema.

gimport/gexport Overview

The *gimport* and *gexport* utilities are used primarily for the following functions:

- Importing database information into RightNow Metrics
- Moving a RightNow Metrics site from one server to another
- Importing data from an external database into RightNow Metrics to maintain separate databases with current information
- Exporting data from RightNow Metrics into external systems

The *gimport* and *gexport* utilities allow you to import or export an entire database or individual tables. A database consists of multiple tables, each of which contain columns of data. To import data into the database requires a way to get the data into the right table and into the right columns. To ensure that the data gets into the right table requires a separate data file (Comma Separated Value or CSV) for each table being imported. To ensure data gets imported into the correct columns in the new database requires a second file (IMP) for each table to specify a method for mapping the columns of the table to the data in the file.

Table 11-1: File Naming Conventions

File	Format
data file	<interface_name>.<table_name>.csv (e.g. rightnow.incidents.csv)
import file	<interface_name>.<table_name>.imp (e.g. rightnow.incidents.imp)

gexport

Using *gexport*, you can export information to create reports or to import into another database. This utility automatically creates two files for each table: an import description file, or.imp file, and a comma separated values file, or CSV.

The *gexport* utility is primarily used for the following functions:

- to back up a database
- to make a copy of customer information

Syntax:

```
gexport [-h] [-v] [-d dirname] [-f datafile] [-i impfile] [-t
table] [-w "where_clause"] interface name
```

Where:

-h = Display this usage information

-v = Display version information

-d = Specifies directory in which to write data and import files (must be specified unless option t is specified)

-f = Specifies name of data file to be created (only valid with option 't')

-i = Specifies name of import file to be created (only valid with option 't')

-t = Specifies name of specific table to export (option ’d’ is required and all tables are exported if this option is not used)

-w = Specifies a SQL ’where’ clause to be used to select the data to be exported

interface name = Name of interface to operate on (corresponds to the name of a .cfg directory without the .cfg suffix)

Examples:

The following example exports the entire RightNow Metrics database and places all files in the /tmp directory for the interface sample:

```
gexport -d /tmp sample
```

The *gexport* utility allows for the specification of an SQL “where” clause to select a subset of the total database. The following example exports the survey_addresses table, which contains customer email addresses. Only addresses that have NOT selected opt out are exported for the interface sample. The files are placed in the /tmp directory:

```
gexport -t survey_addresses -d /tmp -w "where opt_out=0"
sample
```

After exporting the data into a .csv and .imp file, you can view these files with any text editor.

gimport

The utility *gimport* allows bulk importing of data into the RightNow Metrics database. Data can be imported from another RightNow Metrics interface, an Excel spreadsheet, or any other application that can create a file in CSV format.

Syntax:

```
gimport [-h] [-v] [-d dirname] [-f datafile] [-i impfile] [-t
table][-r] [-m] interface name
```

Where:

-h = Display this usage information

-v = Display version information

-d = Specifies directory from which to read data and import files

(must be specified unless option t is used)

-f = Specifies name of a CSV data file to be read from (only valid with option 't')

-i = Specifies name of import file to be read from (only valid with option 't')

-t = Specifies name of specific table to import into

(option d is required and all tables are imported if this option is not used)

-r = Remove all data from a table before importing data into it

interface name = Name of interface to operate on (corresponds to the name of a .cfg directory without the .cfg suffix)

Note: The examples assume that you have done a previous export into the same directory and that all the necessary CSV and IMP files exist.

Examples:

The following example imports an entire RightNow Metrics database from the /tmp directory. The interface name is “sample.”

```
gimport -d /tmp -r sample
```

The following example imports and replaces the survey_addresses table from the /tmp directory for the interface sample.

```
gimport -d /tmp -t survey_addresses -r sample
```

CSV File Characteristics

The data file is in a comma separated value (or CSV) format. This is a standard format supported by most database and spreadsheet programs, and simply means each field or column of data must be separated by commas (for example, field1, field2, field3). Allowable characters within a CSV field include all alphabetic, numeric, punctuation, and tab characters. (The ASCII representations are: 0x09 (tab), and the inclusive range of 0x20 (space) through 0x7E (tilde).)

A CSV field must be surrounded by double quotes if it contains:

- a comma—this ensures that the comma is not used as a field separator (for example, "field1 part1, part2", field2)
- a quote (for example, this ""item"" is ...)
- carriage return or new line

A CSV string (record) must be terminated by a line feed (ASCII 0x0A) or by a carriage return and line feed (ASCII 0x0D, 0x0A).

Example CSV file for the survey_addresses table:

1,"customer@site.com",969865200,0,1,0
2,"customer@company.com",971193935,0,2,0
3,"customer7@site.com",971193935,0,2,0
4,"old_customer@company.com",971193935,0,2,0
5,"new_customer@company.com",971193935,0,2,0
6,"customer8@site.com",971193935,0,2,0
7,"customer9@site.com",971193935,0,2,0
8,"customer2@company.com",978641135,8,18,0
9,"customer@company2.com",978641147,1,2,0
10,"customer3@company.com",978640379,1,1,0
11,"customer2@company2.com",978641147,1,2,0

IMP File Characteristics

Import files map columns of data in a CSV file to database columns. This is done using the following format:

```
<field_name>=$N
```

Where <field_name> is the name defined by the schema, and $N from the data file.

To view the table schema, enter the following command:

```
dbaudit -s <table name> <interface_name>
```

To see the schema for the entire database, enter the following command:

```
dbaudit -S <interface_name>
```

Example of IMP file for survey_addresses table:

```
address_id=$1
email=$2
last_sent=$3
num_replied=$4
num_sent=$5
opt_out=$6
```

msgtool

This utility allows you to change configuration settings or message bases from the command line without having to access the Configuration Editor. You would run *msgtool* if you entered incorrect information into one of the configuration settings that subsequently locked you out of the configuration settings. For example, if you were to enter an invalid IP address in SEC_VALID_ADMIN_HOSTS, the interface would lock and no one could get in. You would then run *msgtool* at the command line to resolve it.

Syntax:

```
msgtool  [-v]  [-d]  [-s slot_name] [-u slot_name:value]
msgfile
```

-h = Display this usage information

-v = Display version information

-d = Dump contents of msgfile in a tab delimited format

-n = Strip all trailing new lines from msgfile string values

-s = Show description and value for specified slot

-u = Update the value of the specified slot

-U = Update the description of the specified slot

By default, configuration setting files are located in:

UNIX:

```
/home/httpd/cgi-bin/<interface>.cfg/config/en_US/<filename>
```

Windows NT/2000:

```
c:\inetpub\scripts\<interface>.cfg\config\en_US\<filename>
```

Message base files are located in:

UNIX:

```
/home/httpd/cgi-bin/<interface>.cfg/msgbase/en_US/<filename>
(UNIX)
```

Windows NT/2000:

```
c:\inetpub\scripts\<interface>.cfg\msgbase\en_US\<filename>
(Windows NT)
```

Examples:

To set the value of the SEC_VALID_ADMIN_HOSTS configuration setting to blank for the interface sample:

Windows NT/2000:

msgtool.exe -u SEC_VALID_ADMIN_HOSTS:"" c:\inetpub\scripts\sample.cfg\config\en_US\common.msg

To update the value of Common>General>Outgoing Email>OE_SMTP_SERVER to mail.domain.com:

UNIX:

```
./msgtool -u OE_SMTP_SERVER:'mail.domain.com' /home/httpd/
cgi-bin/<interface>.cfg/config/en_US/common.msg
```

To set the name of the database to rightnow for the interface sample, use the following:

```
./msgtool -u DB_NAME:'rightnow' /home/httpd/cgi-bin/
sample.cfg/config/en_US/common.msg
```

langcvt

The *langcvt* utility changes the language pack in RightNow Metrics. A language pack is a separate download that is installed after RightNow Metrics has been installed converts from English to the language of the pack. The *langcvt* utility can also switch any RightNow Metrics interface (and optionally the associated database) between any of the supported languages, provided that all of the necessary language files are installed for that interface (including msgbase, configuration, dictionary files).

Syntax:

```
langcvt [-h] [-v] [-y] [-d] [-l five-letter language code]
interface
```

Where:

-h= Display this usage information

-v= Display version information

-y= Do not prompt for verification

-d= Do not change database, only update the language file and configuration for interface

-l= Set new language for interface

language code options: de_DE, en_US, es_ES, fi_FI, fr_FR, it_IT, nl_NL, pt_PT

interface = Name of interface to operate on (corresponds to the name of a .cfg directory without the .cfg suffix)

Configuration Settings

This chapter contains descriptions and default values for RightNow Metrics configuration settings used to customize the functionality of RightNow Metrics. These configuration settings are edited through the RightNow Metrics Configuration Editor.

Opening the Configuration Editor

You can open the Configuration Editor through either of the following methods:

- Enter the URL of the Configuration Editor in your Web browser.
- Click **Configuration** from most RightNow Metrics pages.

Both methods are described in more detail in the following sections.

To open the Configuration Editor from a Web browser:

1. Enter the appropriate URL in your Web browser to open the Configuration Subsystem Standalone Login page:

   UNIX:

   ```
   http://<your_domain>/cgi-bin/<your_interface>.cfg/php/editui/
   login.php
   ```

   Windows NT/2000:

   ```
   http://<your_domain>/scripts/<your_interface>.cfg/php.exe/
   editui/login.php
   ```

Path: Configuration Editor URL

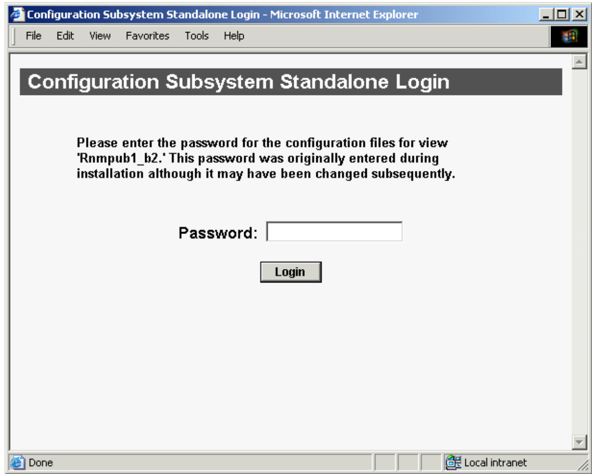


Figure A-1: Configuration Subsystem Standalone Login Page

2. Type the password you entered during installation and click Login to open the Configuration Editor. (This password can be found in the Installation Checklist in the *RightNow Metrics 4.3 Installation Guide*.)

Path: Configuration Editor URL> Login

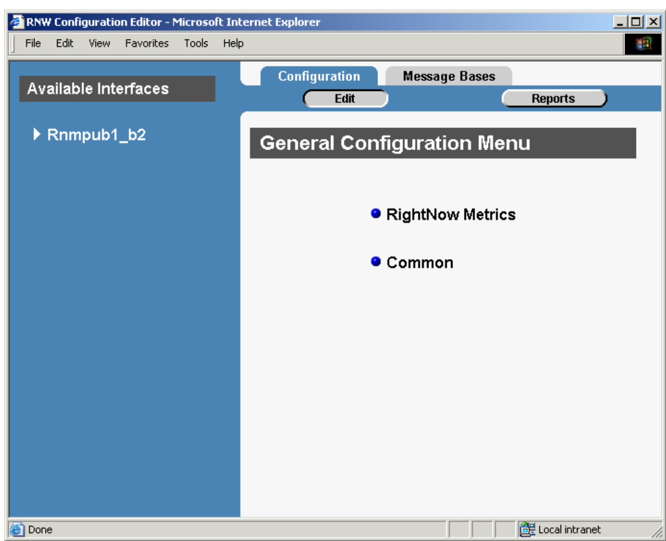


Figure A-2: General Configuration Menu Page

To open the Configuration Editor from RightNow Metrics pages:

1. Open the Metrics Login page through your Web browser by entering the following URL:

UNIX:

```
http://<your_domain>/cgi-bin/<your_interface>.cfg/metrics
```

Windows NT/2000:

```
http://<your_domain>/scripts/<your_interface>.cfg/metrics.exe
```

Path: Metrics URL

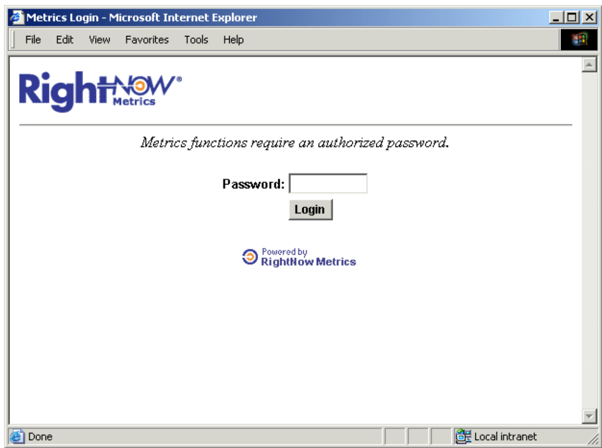


Figure A-3: RightNow Metrics Login Page

2. Type your RightNow Metrics login password and click Login to open the Active Surveys page. This value is blank until you enter a password in the following configuration setting:

RightNow Metrics>General>Survey Settings>SURV_ADMIN_PASSWD

Note: For instructions on finding specific settings, refer to “Finding and Editing a Configuration Setting” on page A-8.

Path: Metrics URL> Login

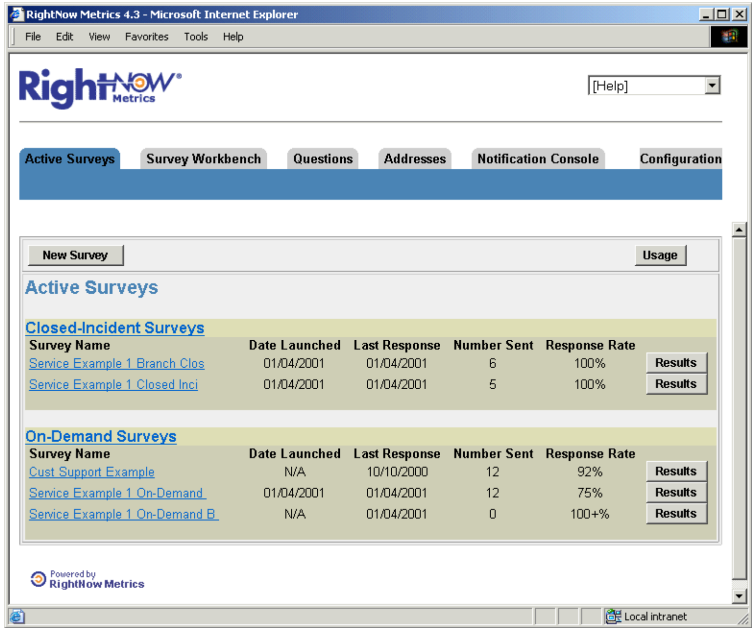


Figure A-4: Active Surveys Page

3. Click **Configuration** to open the Configuration Editor in a new window.

Path: Metrics URL> Login >Configuration

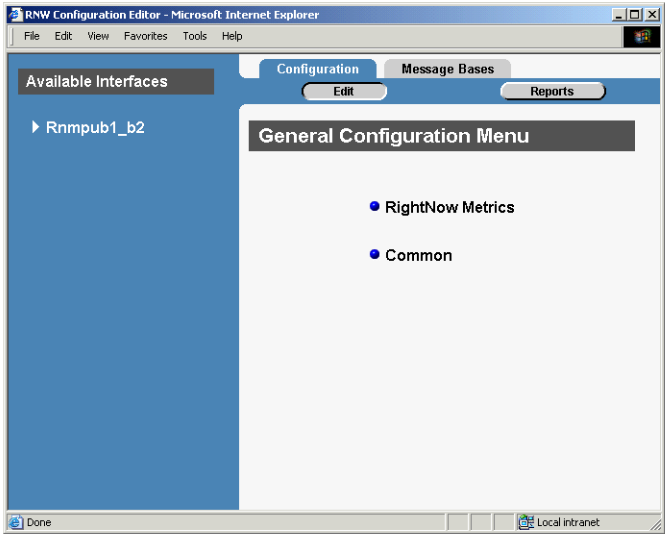


Figure A-5: General Configuration Menu

From the General Configuration Menu you can view and edit configuration settings for your interface, generate reports, or switch to the message bases. The following section describes how you can generate reports and edit your configuration settings.

Generating Configuration Reports

You can generate reports that list your configuration settings and corresponding values. This function allows you to capture and save any of your custom settings for future reference or quickly find a particular setting.

To generate a General Configuration report:

1. From the Configuration Editor, click Reports.

Path: Configuration> Reports

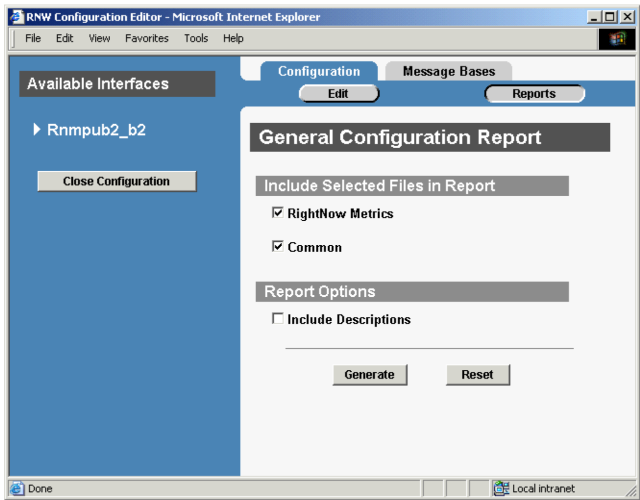


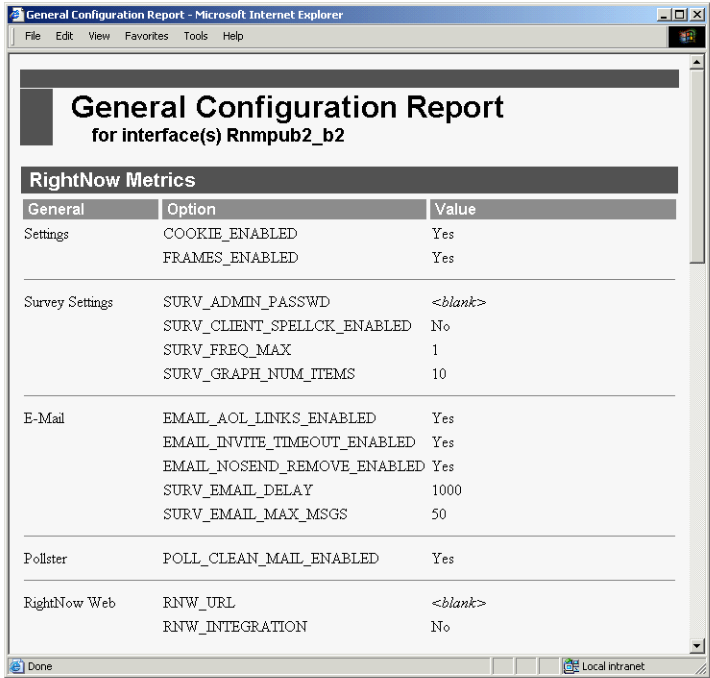
Figure A-6: General Configuration Report Selection

2. Select ☑ RightNow Metrics and ☑ Common to include all configuration settings in the report.

3. To include descriptions in the report, select ☐ Include Descriptions .

4. Click Generate to generate and display the General Configuration Report.

Path: Configuration> Reports > Generate



General Configuration Report - Microsoft Internet Explorer

File Edit View Favorites Tools Help

General Configuration Report

for interface(s) Rnmpub2_b2

RightNow Metrics

General	Option	Value
Settings	COOKIE_ENABLED	Yes
	FRAMES_ENABLED	Yes
Survey Settings	SURV_ADMIN_PASSWD	*<blank>*
	SURV_CLIENT_SPELLCK_ENABLED	No
	SURV_FREQ_MAX	1
	SURV_GRAPH_NUM_ITEMS	10
E-Mail	EMAIL_AOL_LINKS_ENABLED	Yes
	EMAIL_INVITE_TIMEOUT_ENABLED	Yes
	EMAIL_NOSEND_REMOVE_ENABLED	Yes
	SURV_EMAIL_DELAY	1000
	SURV_EMAIL_MAX_MSGS	50
Pollster	POLL_CLEAN_MAIL_ENABLED	Yes
RightNow Web	RNW_URL	*<blank>*
	RNW_INTEGRATION	No

Done Local intranet

Figure A-7: General Configuration Report Page

Finding and Editing a Configuration Setting

The configuration settings allow you to customize the settings that affect the operation and display of RightNow Metrics to you and your customers. If you want to edit and change a value, you first need to identify the configuration setting and then change its value. Generating and searching a general configuration report allows you to quickly identify the appropriate configuration setting.

To find a configuration setting in a generated report:

1. Generate a report according to the procedure detailed in “Generating Configuration Reports” on page A-6.
2. Select Edit>Find from your Web browser’s menu bar or press **Ctrl+F** on your keyboard. This will enable the find feature in your Web browser.
3. Type the text you want to find. The text can be the actual configuration setting string or text from the description.
4. Click **Find Next** until you find the setting or text.

   Note: Check the description (if there is one) to verify this is the correct configuration setting.
5. Scroll up in the report and make a note of the Configuration Label, Sub-section, Section, and File that the setting is located in.

To edit a configuration setting:

1. Click your Web browser’s Back button or press **Alt+Left Arrow** to return to the General Configuration Menu.
2. Click the file (either ● RightNow Metrics or ● Common) that contains the configuration setting you want to edit.

Path: Configuration> RightNow Metrics

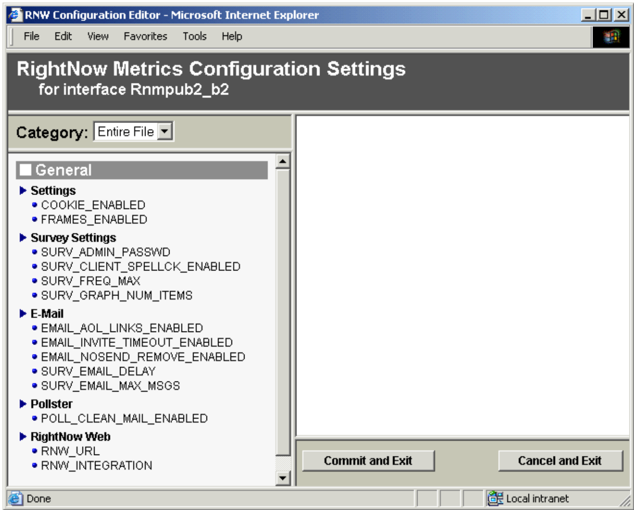


Figure A-8: Configuration Settings Page

3. Click the appropriate configuration setting.

4. Make the change in the Value field (enter the text or select the option).

5. Click Update and Commit and Exit to save your changes and update the configuration setting.

6. Check to make sure the changes were made.

Note: If changes were not applied as you expected, you edited a different configuration setting. Return to the configuration settings and change the setting back to its previous value. Then repeat these steps until you locate the correct setting.

Configuration Settings

Configuration settings are used to customize RightNow Metrics for your specific needs and to integrate with RightNow eService Center or other CRM programs. Configuration settings are grouped into the following categories:

- **RightNow Metrics**—Contains the configurations that are specific to the RightNow Metrics operation. The configurations include survey results display options, email survey sending options, and RightNow integration configurations. These configuration settings are described in Table A-1, "RightNow Metrics Configuration Settings," on page A-10.
- **Common**—Contains the configurations for integrating RightNow Metrics with your Web server, database server, and mail server. You can also set the password for your standalone configuration component through the Common configuration settings. These configuration settings are described in Table A-2, "Common Configuration Settings," on page A-12.

Note: Some Common configuration settings are set during installation and allow you to immediately operate your RightNow Metrics site. These settings should reflect the information you recorded in your Installation Checklist during the installation process. For more information, see the *RightNow Metrics 4.3 Installation Guide.*

RightNow Metrics Configuration Settings

The following table describes RightNow Metrics configuration settings in more detail and lists the default values.

Table A-1: RightNow Metrics Configuration Settings

Category	Description
General	
◆Settings	
COOKIE_ENABLED	Some government agencies and other companies have strict rules against sending/setting cookies. Therefore, the cookie sending can be disabled with this configuration variable. Default is enabled (Yes).
FRAMES_ENABLED	When enabled, the top level button bar is in a separate frame which does not scroll off the top of the console when large pages are scrolled vertically. Default is enabled (Yes).
◆Survey Settings	
SURV_ADMIN_PASSWD	On the standalone version of this product, you need an administration password to access the site. Default is blank.

Table A-1: RightNow Metrics Configuration Settings (Continued)

Category	Description
SURV_CLIENT_SPELLCK_ENABLED	If enabled, any Web surveys that are created with at least one short answer question will have a Spell Check button appearing on it. This button will invoke a Java applet that allows anyone answering the survey (who has Java installed and enabled on their browser) to spell check all the short answer responses on the survey page. If Java is not available (or not enabled), pressing this button will have no effect. Default is disabled (No).
SURV_FREQ_MAX	The maximum number of times any particular user can be sent a Closed-Incident Survey. Codes below represent: 1-After Every Closed-Incident, 2-At Most Once per Month, 3-At Most Once per Quarter, 4-Only Once. Default is 1.
SURV_GRAPH_NUM_ITEMS	On the graphical results page, the responses to short answer questions are listed in a table. The number of responses listed is specified by this verb. Default is 10.
◆E-Mail	
EMAIL_AOL_LINKS_ENABLED	If enabled, this will allow the inclusion of AOL links in all email invitations. Default is enabled (Yes).
EMAIL_INVITE_TIMEOUT_ENABLED	If enabled, this will allow *pollster* to remove invitations in which no response was received within 3 weeks. This saves a lot of database space in ongoing Closed-Incident surveys. Default is enabled (Yes).
EMAIL_NOSEND_REMOVE_ENABLED	If enabled, entries for invitations that are not sent due to opt-out or time constraint issues are removed. Default is enabled (Yes).
SURV_EMAIL_DELAY	Delay in milliseconds between each outgoing e-mail sent by *pollster*. Default is 1000.
SURV_EMAIL_MAX_MSGS	Maximum number of e-mails to be sent by *pollster* each time it is run. Default is 50.
◆Pollster	
POLL_CLEAN_MAIL_ENABLED	If enabled, this will allow *pollster* to purge the mailbox after all surveys are processed. Invalid addresses, auto email replies, and spam will tend to accumulate in mailboxes when this option is disabled. Default is enabled (Yes).
◆RightNow Web	
RNW_URL	The URL is the location of RightNow eService Center. Default is blank.

Table A-1: RightNow Metrics Configuration Settings (Continued)

Category	Description
RNW_INTEGRATION	Enables the use of RightNow eService Center user names, passwords, and profiles to log into RightNow Metrics. This feature is only compatible with RightNow eService Center 5.5.1 and higher. Default is disabled (No).

Common Configuration Settings

The following table describes Common configuration settings in more detail and lists the default values.

Note: The default values listed may differ because the values may have been set during installation.

Table A-2: Common Configuration Settings

Category	Description
General	
◆Directories	
DIR_CGI	Specifies the Web alias for the location of your scripts or CGI directory on your Web server. For example, if entering http://www.yourdomain.com/scripts/scriptname accesses a CGI script named scriptname, then enter “scripts” (no quotes). If Right Now Technologies is your host, this is ignored. Default is cgi-bin.
DIR_DOCUMENT_ROOT	The file system path to the directory which is mapped to the document root for the Web server used by RNW. Default is /home/httpd/html.
DIR_TEMP	Specifies the directory where temporary files will be created. When a RightNow eService Center application needs to create certain temporary files, they will be put in this directory. If this setting is left blank, the systems temporary environment variable will be used (TMPDIR on *NIX systems, and TMP on Windows systems). Default is blank. **Caution:** Certain types of temporary files (such as file attachments) will not be created in this directory due to other restrictions.
◆Outgoing E-mail	
OE_SMTP_SERVER	Specifies the name of the host through which all outgoing mail is sent. In most cases, this should be the fully qualified domain name of your outgoing mail server. If RightNow Technologies is your host, this setting is ignored. Default is blank.

Table A-2: Common Configuration Settings (Continued)

Category	Description
OE_WEB_SERVER	Specifies the full host name of the Web server (e.g., www.yourdomain.com). This value is used only in the body of outgoing messages. If RightNow Technologies is your host, this value is ignored. Default is blank.
◆ **Security**	
SEC_CONFIG_PASSWD	Specifies the password required for access to the configuration settings editor. Default is blank.
SEC_VALID_ADMIN_HOSTS	Defines which hosts are allowed to access the administration pages. Valid entries include a comma-separated list of domain names with wildcards, specific IP addresses or IP subnet masks (e.g., *.rightnowtech.com,1.2.3.4, 10.11.12.0/255.255.255.0). Only users logging in from hosts matching entries in this list are allowed access to the Administration pages. Default is blank.
SEC_VALID_ENDUSER_HOSTS	Defines which hosts are allowed to access the end-user pages. Valid entries include a comma-separated list of domain names with wildcards, specific IP addresses or IP subnet masks (e.g., *.rightnowtech.com,1.2.3.4, 10.11.12.0/255.255.255.0). Only users logging in from hosts matching entries in this list are allowed access to the end-user pages. Default is blank.
SEC_EU_ADMIN_HOSTS	Defines which hosts are allowed to access the end-user pages without affecting the statistic collection. Valid entries include a comma-separated list of domain names with wildcards, specific IP addresses or IP subnet masks (e.g., *.rightnowtech.com,1.2.3.4, 10.11.12.0/255.255.255.0). Users logging in from hosts matching entries in this list are not counted, which allows administrators to view the end-user pages without affecting reporting. Default is blank.
SEC_HTTP	If enabled (Yes), the secure HTTP protocol will be used to access the site. This will also affect the absolute URLs generated in outgoing e-mail messages. Please note, however, that if you set this and your site is not set up for SSL at the Web server level, you will break your site. If you are hosted by RightNow Technologies, please contact your sales person to have this enabled. Default is disabled (No).

Table A-2: Common Configuration Settings (Continued)

Category	Description
Localization	
◆Character Set	
LOC_CHARSET	The character set required by the language that RightNow eService Center has been translated into. This value is set in the HTTP content-type header or equivalent META tag for all Web pages. If blank (the default), no character set is specified, leaving the character set up to the browser (aside from special foreign versions, almost all browsers default to US/English). The explicit character set for US/English and most Western European 7-bit languages is 'iso-8859-1'. Default is blank.
Date/Time	
◆Timezone	
TZ_DATABASE	Specifies the time zone for the database, which should be the time zone where the database resides. If your Web server and database are using the same time zone, leave this setting blank. This setting is not functional when running on a Windows NT/2000 server. The format is UNIX-style TZ variable (e.g., New York City might use EST5EDT or GMT+5, London might use Greenwich or GMT+0, etc.) or, if you are in the continental U.S., you may use EASTERN, CENTRAL, MOUNTAIN, or PACIFIC. Please refer to your operating system documentation for actual time zone names supported by your system. The value that you enter for this setting is passed to the operating system verbatim. Leaving the value blank will default the database to the system time zone of the server. (For more information please refer to our online Answer [keyword: time zone] on our Web site: http://rightnow.custhelp.com). Default is blank. **Note:** If you are hosted by RightNow Technologies - DO NOT CHANGE THIS SETTING.
TZ_INTERFACE	Specifies the time zone for where the interface is going to be used (i.e., if the Web server is in New York and the interface is for a company in Los Angeles, then the time zone should be set to PACIFIC). This setting is not functional when running on an Windows NT/2000 server. The format is a UNIX-style TZ variable (e.g., New York City might use EST5EDT or GMT+5, London might use Greenwich or GMT+0, etc.) or, if you are in the continental U.S., you may use EASTERN, CENTRAL, MOUNTAIN, or PACIFIC. Please refer to your operating system documentation for actual time zone names supported by your system. The value that you enter for this setting is passed to the operating system verbatim. Leaving the value blank will default the interface to the system time zone of the server. (For more information, please refer to our online Answer [keyword: time zone] on our Web site: http://rightnow.custhelp.com) Default is blank.

Table A-2: Common Configuration Settings (Continued)

Category	Description
◆Formats	
DTF_LONG_DATE	Long date format, e.g., "Monday, December 27, 1999." Default is %A, %b %d, %Y.
DTF_SHORT_DATE	Short date format, e.g., "12/27/1999." Default is %m/%d/%Y.
DTF_MONTH_YEAR_DATE	Date format for when just month and year are needed, e.g., "December 1999." Default is %b %Y.
DTF_TIME	Time format, e.g., "12:24 PM." Default is %I:%M %p.
DTF_YEAR_DATE	Year only date format, e.g., "2000." Default is %Y.
DTF_MONTH_DAY_DATE	Short international date format for when just month and day are needed, e.g., "12/27." Default is %m/%d.
Database	
◆User Account	
DB_LOGIN	Specifies the database user name. If RightNow Technologies is your host, this is ignored. Default is blank.
DB_PASSWD	Specifies the database password for the user specified in DB_LOGIN. If RightNow Technologies is your host, this is ignored. Default is blank.
◆ODBC	
ODBC_DSN	Specifies the name of the ODBC data source (stands for Data Source Name) and is used as the database name. If RightNow Technologies is your host, this is ignored. Default is blank.
◆Oracle	
ORACLE_HOME	Specifies the Oracle installation directory, used for Oracle implementations only. This corresponds to the ORACLE_HOME environment variable. Default is blank.
ORACLE_SID	Specifies the Oracle database name, used for Oracle implementations only. This corresponds to the ORACLE_SID environment variable and is used as the database name. Default is blank.
ORACLE_SERVICE	Specifies the Oracle service name, used for Oracle implementations only. If you have a properly configured TNS listener running and wish to connect over SQL*Net, set this to the appropriate service name. Leave it blank to bypass the listener and connect directly to Oracle. Default is blank.

Table A-2: Common Configuration Settings (Continued)

New

Category	Description
ORACLE_DATA_TS	The name of the Oracle tablespace in which tables are to be created. It is strongly recommended that tables and indexes be placed in tablespaces on different disk controllers or at least different disks. If blank, tables will be placed in the default tablespace of the Oracle account specified in DB_LOGIN. Default is blank.
ORACLE_INDEX_TS	The name of the Oracle tablespace in which indexes are to be created. It is strongly recommended that tables and indexes be placed in tablespaces on different disk controllers or at least different disks. If blank, indexes will be placed in the default tablespace of the Oracle account specified in DB_LOGIN. Default is blank.
ORACLE_INSTALL_SIZE	Sets the initial size (SMALL, MEDIUM, LARGE) of database objects. This value has its main impact when the database is initially set up, but will also affect objects created during upgrades and temporary objects. Choosing a value which is too large for your database will waste space. Choosing a value which is too small will result in storage fragmentation and performance degradation. Default is medium.
ORACLE_NLS	The functionality of this verb is fully described in the Oracle manuals. Essentially it needs to match what your database is currently set to. To get the value that your database is currently set to do the following SQL command from the Oracle SQL prompt. --- Begin SQL code --- select a.value ||'_'||b.value||'.'||c.value from nls_database_parameters a, nls_database_parameters b,nls_database_parameters c where (a.parameter = 'NLS_LANGUAGE') and (b.parameter = 'NLS_TERRITORY') and (c.parameter = 'NLS_CHARACTERSET'); --- End SQL code --- Example Strings: AMERICAN_AMERICA.WE8ISO8859P1 AMERICAN_AMERICA.US7ASCII Default is blank.
◆MySQL	
DB_NAME	Specifies the RightNow Web database name. This is also used for multiple interfaces utilizing the same database (see the manual for more information). Default is blank.
DB_SERVER	Specifies the name of the server where the MySQL database is located. This needs to be configured only if your web server is not the same as your database server. If Right Now Technologies is your host, this is ignored. Default is blank.

Message Bases

This chapter contains the message bases or text strings used within RightNow Metrics. The Message Base Editor is used to change the descriptive text strings within RightNow Metrics and to translate the text strings to other languages.

Message bases consist of descriptive text used for RightNow Metrics, including:

- Text strings
- Page headings
- Page sub-headings
- Descriptive labels or text
- Text on buttons
- Error messages

The Message Base Editor enables you to translate the user interface into different languages using single-byte characters for international language support. These text strings can be edited with the Message Base Editor.

Note: Any changes you make in the message bases may be overwritten by future updates or versions of RightNow Metrics and will have to be re-entered.

Opening the Message Base Editor

You can access the Message Base Editor through the Configuration Editor. The Configuration Editor can be opened through either of two methods:

- Enter the URL of the Configuration Editor in your Web browser.
- Click **Configuration** from most RightNow Metrics pages.

Both methods are described in more detail in the following sections.

To open the Message Base Editor from a Web browser:

1. Enter the appropriate URL in your Web browser to open the Configuration Subsystem Standalone Login page:

UNIX:

```
http://<your_domain>/cgi-bin/<your_interface>.cfg/php/editui/
login.php
```

Windows NT/2000:

```
http://<your_domain>/scripts/<your_interface>.cfg/php.exe/
editui/login.php
```

Path: Configuration Editor URL

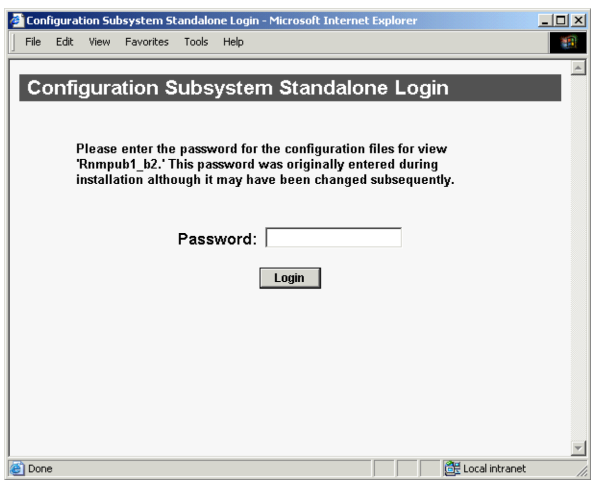


Figure B-1: Configuration Subsystem Standalone Login Page

2. Type the password you entered during installation and click **Login** to open the Configuration Editor. (This password can be found in the Installation Checklist in the *RightNow Metrics 4.3 Installation Guide*.)

Path: Configuration Editor URL> Login

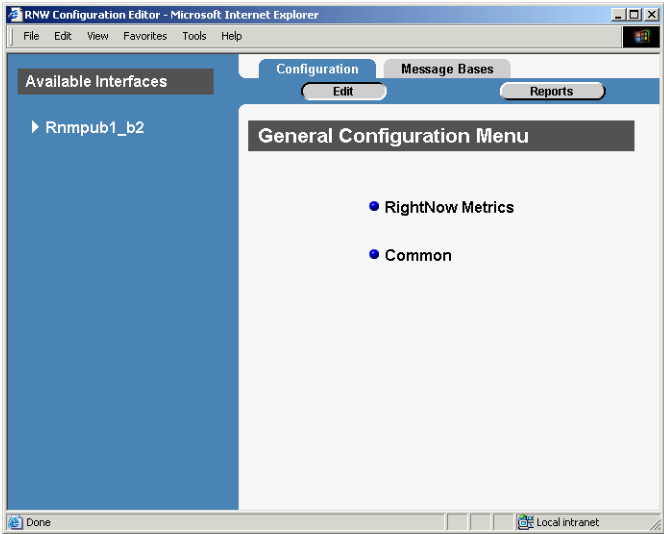


Figure B-2: General Configuration Menu

3. Click Message Bases to display the Message Base Menu.

Path: Configuration Editor URL> Login ***>Message Bases***

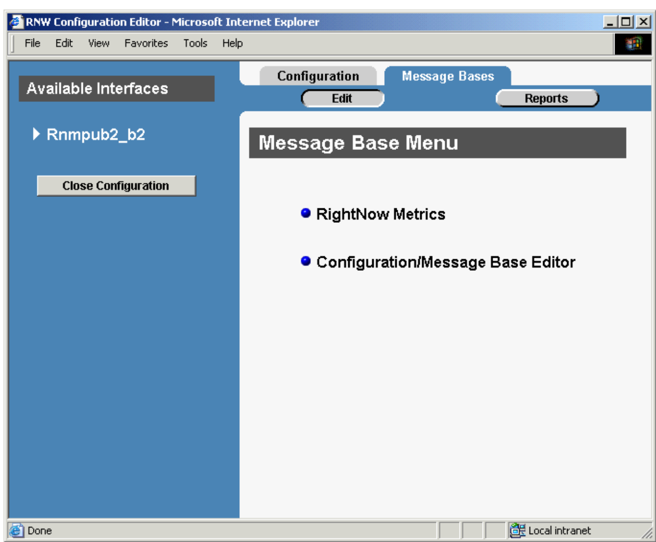


Figure B-3: Message Base Menu

To open the Message Base Editor from RightNow Metrics pages:

1. Open the Metrics Login page through your Web browser by entering the following URL:

   UNIX:

   ```
   http://<your_domain>/cgi-bin/<your_interface>.cfg/metrics
   ```

   Windows NT/2000:

   ```
   http://<your_domain>/scripts/<your_interface>.cfg/metrics.exe
   ```

Path: Metrics URL

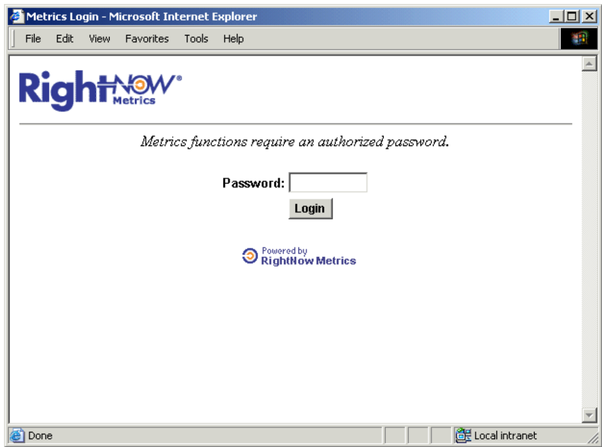


Figure B-4: RightNow Metrics Login Page

2. Type your RightNow Metrics login password and click **Login** to open the Active Surveys page. This value is blank until you enter a password in the following configuration setting:

   RightNow Metrics>General>Survey Settings>SURV_ADMIN_PASSWD

   Note: For instructions on finding specific settings, refer to “Finding and Editing a Configuration Setting” on page A-8.

Path: Metrics URL> Login

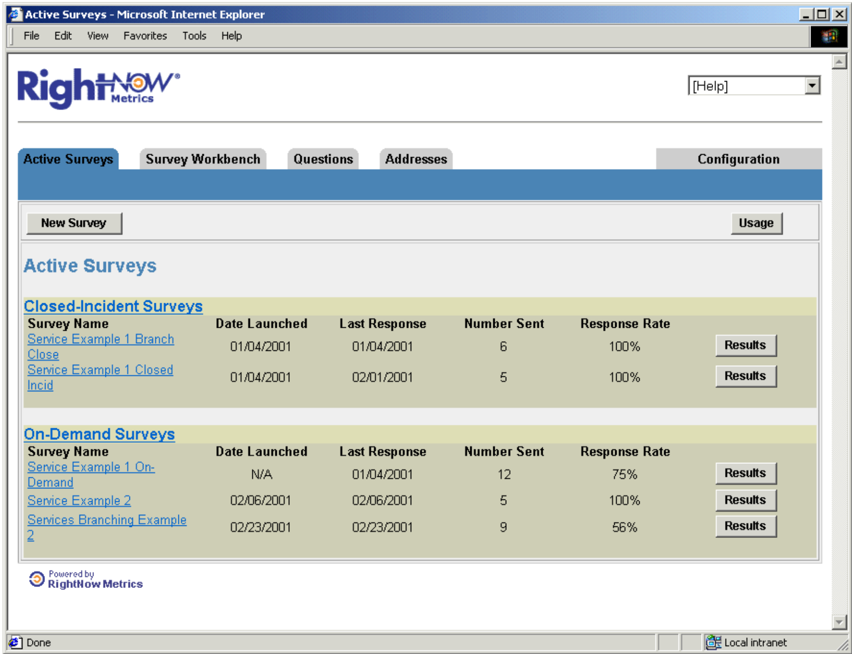


Figure B-5: Active Surveys Page

3. Click Configuration to open the Configuration Editor in a new window.

Path: Metrics URL>* Login *>Configuration

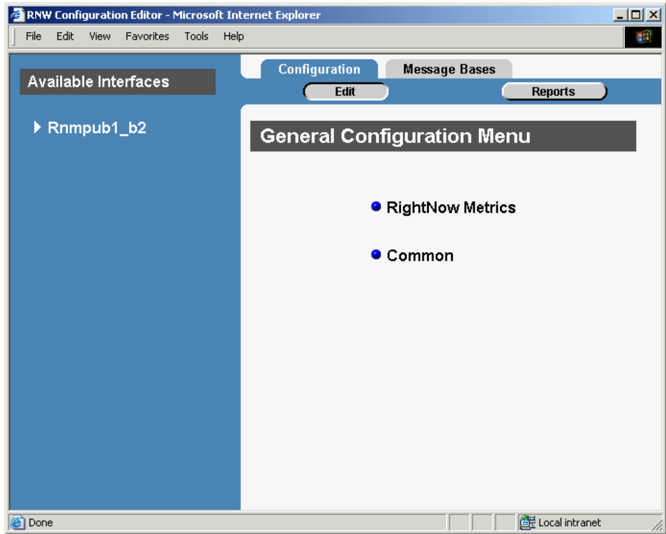


Figure B-6: General Configuration Menu

4. Click Message Bases to display the Message Base Menu.

Path: Metrics URL> Login >Configuration>Message Bases

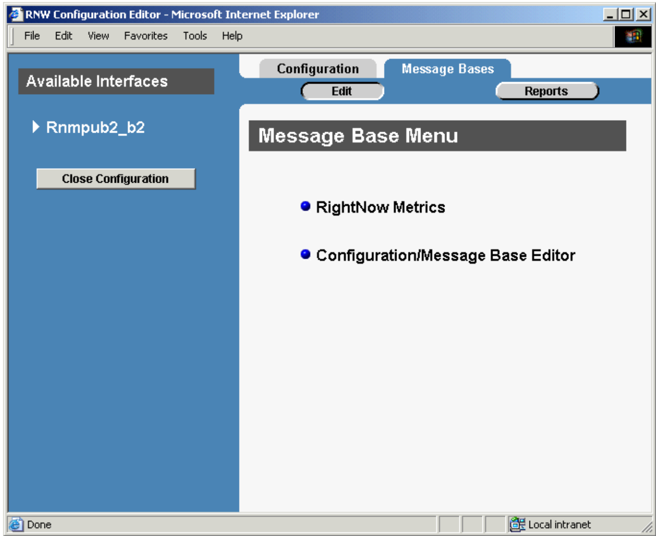


Figure B-7: Message Base Menu

From the Message Base Menu, you can view and edit message base settings and text strings for your interface, generate reports, or switch to the Configuration Editor. The following sections describe how you can generate reports and edit your message base text string settings.

Generating a Message Base Report

With the large number of message bases available in RightNow Metrics, it is helpful to run a message bases report when you want to make a change. You can then easily locate and edit specific message bases.

To generate a Message Base report through the Message Base Editor:

1. From the Message Base Editor, click Reports.

Path: Message Bases> Reports

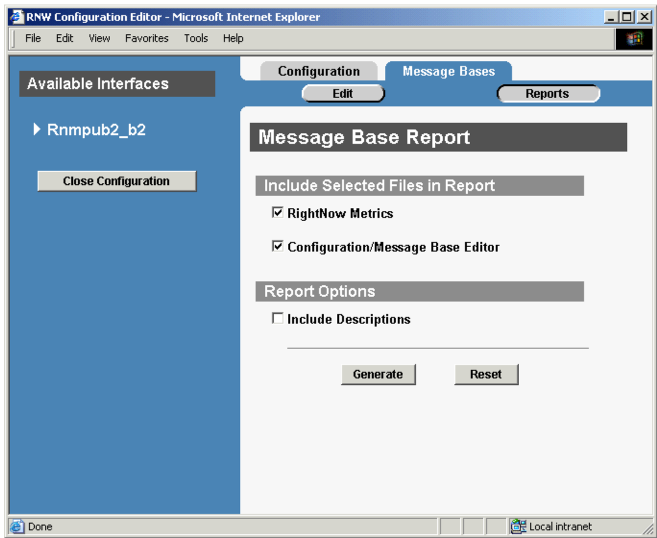


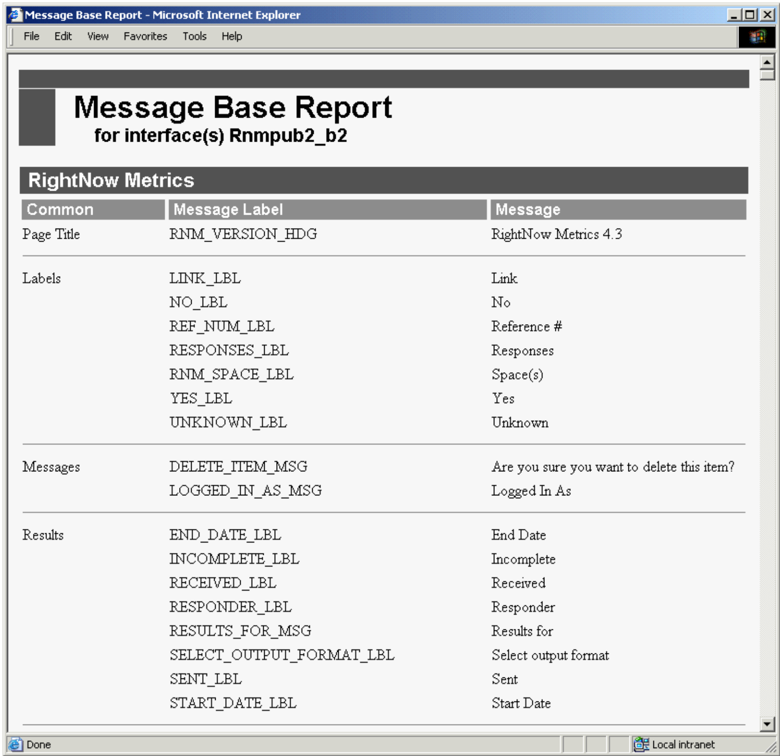
Figure B-8: Message Base Report Selection

2. Select ☑ RightNow Metrics and ☑ Configuration/Message Base Editor to include all message bases in the report.

3. To include descriptions in the report, select ☐ Include Descriptions.

4. Click Generate to generate and display the Message Base Report.

Path: Message Bases> Reports > Generate



Message Base Report - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Message Base Report
for interface(s) Rnmpub2_b2

RightNow Metrics

Common	Message Label	Message
Page Title	RNM_VERSION_HDG	RightNow Metrics 4.3
Labels	LINK_LBL	Link
	NO_LBL	No
	REF_NUM_LBL	Reference #
	RESPONSES_LBL	Responses
	RNM_SPACE_LBL	Space(s)
	YES_LBL	Yes
	UNKNOWN_LBL	Unknown
Messages	DELETE_ITEM_MSG	Are you sure you want to delete this item?
	LOGGED_IN_AS_MSG	Logged In As
Results	END_DATE_LBL	End Date
	INCOMPLETE_LBL	Incomplete
	RECEIVED_LBL	Received
	RESPONDER_LBL	Responder
	RESULTS_FOR_MSG	Results for
	SELECT_OUTPUT_FORMAT_LBL	Select output format
	SENT_LBL	Sent
	START_DATE_LBL	Start Date

Done Local intranet

Figure B-9: Message Base Report Page

Finding and Editing a Message Base String

The message base strings allow you to customize the text strings that display to you and your customers. When you want to change a message base string, you must first identify the message base setting. Generating and searching a message base report allows you to quickly identify the message base. The report you generate will contain the message base strings you will search.

Note: The more you edit the message bases, the less your installation will resemble our documentation.

To find a message base string in a generated report:

1. Generate a report according to the procedure detailed in "Generating a Message Base Report" on page B-8.
2. Select Edit and Find from your Web browser's menu bar or press **Ctrl+F** on your keyboard. This will enable the find feature in your Web browser.
3. Type in the text you want to change.
4. Click **Find Next** until you find the correct message base.

   Note: Check the description (if there is one) to verify this is the correct text string.
5. Scroll up in the report and make a note of the Message Label, Sub-section, Section, and File that the setting is located in.

To edit the message base text:

1. Click your Web browser's Back button or press **Alt+Left Arrow** to return to the Message Base Editor.
2. Click the file (either RightNow Metrics or Configuration/Message Base Editor) that contains the message base string to edit.
3. Select the message base's section from the Category drop-down menu.
4. Click the appropriate message base.
5. Make the change in the Message text field.
6. Click Update and Commit and Exit to save your changes and update the message base.
7. Check to make sure the changes were made.

   Note: If changes were not applied as you expected, you edited a different message base. Return to the message bases and change the string back to its previous value. Then repeat these steps until you locate the correct string.

RightNow Metrics Message Bases

These message base strings make up the text strings displayed throughout the RightNow Metrics product. The text strings appear on the administration pages.

Following is a list of the categories of files that contain the message base strings. The message bases are displayed after selecting one of the categories from the Category drop-down menu.

Entire File—This listing displays the entire message base for RightNow Metrics Message Base.

General—This set of message base text strings contains labels and text used in common areas throughout RightNow Metrics.

Menu Items/Buttons—This set of message bases contains text strings used in button and menu item labels.

Metrics Login/Navigation—This set of message base text strings contains text used in navigation and login areas and pages. This includes labels, messages, and headings.

Customer Info—This set of message base text strings contains text used in the Customer Details areas. This includes page titles, labels, and headings.

Surveys—This set of message base text strings contains text used in survey display and creation areas. This includes page titles, labels, messages, and headings.

Survey Workbench—This set of message base text strings contains text used in the Survey Workbench areas, including the Survey Layout page. This includes page titles, labels, messages, and headings.

Questions—This set of message base text strings contains text used in survey question and question creation areas. This includes headings, labels, and messages.

Error Messages—This set of message base text strings contains text used in RightNow Metrics error messages such as question and survey areas.

Address Console—This set of message base text strings contains text used in the Addresses page area such as titles, labels, and messages.

Survey Results—This set of message base text strings contains text used in the display of survey results, including graphical, tabular, and CSV. This includes labels and messages.

Pollster/Utilities—This set of message base text strings contains text used in running *pollster* and other utilities. This includes labels and messages.

Configuration/Message Base Editor

These message base strings make up the text strings displayed throughout the RightNow Metrics product. The text strings appear on all pages, including administrative pages.

Following is a list of the categories of files that contain the message base strings. The message bases are displayed after selecting one of the categories from the Category drop-down menu.

Entire File—This listing displays the entire message base for RightNow Metrics Configuration/ Message Base Editor.

Lists—This set of message bases contains text strings for file labels and the names of data types used in RightNow Metrics.

Login—This set of message bases contains text strings used for the Standalone Configuration Editor. Here you can change the title name, login instructions, and other label names and messages.

Menu—This set of message bases contains text strings used in the titles, labels, messages, headings, and sub-headings of the Configuration Editor and Message Base Editor menu selections.

Editor—This set of message bases contains text strings used in the titles, labels, messages, headings, and sub-headings of the Configuration Editor and Message Base Editor.

Edit Special Page—This set of message bases contains text strings used in the titles, labels, messages, buttons, and headings used in updating the Configuration Editor and Message Base Editor.

Reports—This set of message bases contains text strings used in the labels, headings, and values of the Configuration Editor and Message Base Editor reports.

Predefined Questions and Surveys

The following sections list predefined questions and surveys included in RightNow Metrics.

Predefined Questions

The following section lists the predefined questions available in RightNow Metrics and the library where the question is stored.

Age

Library: Multiple Choice

What is your age?

Under 20
21 to 25 years
26 to 30 years
31 to 35 years
36 to 40 years
41 to 45 years
46 to 50 years
51 to 55 years
56 to 60 years
61 to 65 years
Over 65 years

Annual Income Net

Library: Multiple Choice

What is your annual income (net)?

Under $20,000
$20,001 to $50,000
$50,001 to $100,000
$100,001 to $150,000
$150,001 to $200,000
$200,001 to $250,000
$250,001 to $300,000
$300,001 to $350,000
$350,001 to $400,000

$400,001 to $500,000
Over $500,001

Business Ease

Library: Multiple Choice

When working with our company, to what extent is our company easy to do business with?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Client Time

Library: Multiple Choice

How many years have you been a client with our company?

Less than 1 year
1 to 3 years
4 to 7 years
8 to 11 years
12 to 15 years
16 to 20 years
21 to 25 years
More than 25 years

Communications

Library: Multiple Choice

How satisfied are you with communications and follow-up on problem resolutions?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

Competitive Priced Products

Library: Multiple Choice

When working with our company, to what extent does our company provide price competitive products?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Courteousness

Library: Multiple Choice

How satisfied are you with our customer service courteousness?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

Customer Time

Library: Multiple Choice

How long have you been our customer?

Less than 1 year
1 to 3 years
4 to 7 years
8 to 11 years
12 to 15 years
16 to 20 years
21 to 25 years
More than 25 years

Education Level

Library: Multiple Choice

What is your current level of education?

Less than high school
High school or GED
Some college
Associates degree
Technical or vocational school
Bachelors degree
Graduate degree

Ethnicity

Library: Multiple Choice

What is your ethnicity?

African American
Caucasian
Hispanic
Asian
Multi-ethnic
Native American
Other

Excellent Communications

Library: Multiple Choice

When working with our company, to what extent do you believe that we are committed to excellent communication with our customers?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Feedback

Library: Short Answer

Please tell us what we should do to improve the quality of support we provide to you and your organization.

Flexibility Business Practices

Library: Multiple Choice

When working with our company, to what extent is the flexibility of our business practices meeting your expectations?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Gender

Library: Multiple Choice

Gender

Male
Female

Hear About Company

Library: Check All

How did you hear about us?

Word of Mouth
Advertisement
Newspaper
Magazine Article
Direct Mail
At an Exposition
TV Commercial
Radio
The Internet
Other

Hear About Products

Library: Check All

How did you hear about our products?

- Word of Mouth
- Advertisement
- Newspaper
- Magazine Article
- Direct Mail
- At an Exposition
- TV Commercial
- Radio
- The Internet
- Other

Household Number

Library: Multiple Choice

What is the total number of people living in your household?

- 1 individual
- 2 individuals
- 3 individuals
- 4 individuals
- 5 individuals
- 6 individuals
- 7 or more individuals

Knowledgeable

Library: Multiple Choice

How satisfied are you that our help desk support staff are sufficiently knowledgeable and professional?

- Very Satisfied
- Somewhat Satisfied
- No Opinion
- Somewhat Unsatisfied
- Very Unsatisfied

Marital Status

Library: Multiple Choice

What is your marital status?

Single
Married
Divorced
Widow / Widower

Overall Performance

Library: Range

Please rate the overall performance of our entire Customer Services Organization (Support, Training, Installation and Documentation). (1=poor, 5=excellent)

1
2
3
4
5

Price Competitive Products

Library: Multiple Choice

When working with our company, to what extent is the price competitiveness of our products meeting your expectations?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Price Competitive Services

Library: Multiple Choice

When working with our company, to what extent is the price competitiveness of our services meeting your expectations?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Problem Resolution Expectations

Library: Multiple Choice

When working with our company, to what extent is our ability to resolve problems meeting your expectations?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Problem Resolution/Recovery

Library: Multiple Choice

How satisfied are you with our customer service problem resolution / recovery?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

Product Availability

Library: Multiple Choice

How satisfied are you with our product availability?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

Product Quality

Library: Multiple Choice

When working with our company, to what extent does our company provide high quality products?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Products On Time

Library: Multiple Choice

When working with our company, to what extent do we consistently deliver products on time?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Purchase Time

Library: Multiple Choice

How many years have you purchased products from our company?

Less than 1 year
1 to 3 years
4 to 7 years
8 to 11 years
12 to 15 years
16 to 20 years
21 to 25 years
More than 25 years

Purchases

Library: Multiple Choice

Approximately how often do you purchase from our company?

Never
3 to 4 times a year
Once or twice a month
More than once a week
Once a week

Reliable Products

LIbrary: Multiple Choice

When working with our company, to what extent do we provide reliable products?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Reliable Services

Library: Multiple Choice

When working with our company, to what extent do we provide reliable services?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Request Responsive

Library: Multiple Choice

When working with our company, to what extent are we responsive to your requests?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Response Time

Library: Multiple Choice

How satisfied are you with our response time to your specific question?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

Responsiveness

Library: Multiple Choice

How satisfied are you with our customer service responsiveness?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

Responsiveness Requests

Library: Multiple Choice

When working with our company, to what extent is our responsiveness to your requests meeting your expectations?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Service Availability

Library: Multiple Choice

How satisfied are you with our service availability?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

Service Quality

Library: Multiple Choice

When working with our company, to what extent do we provide high quality services?

To no extent

To some extent

Neutral

To a great extent

To a very great extent

Services on Time

Library: Multiple Choice

When working with our company, to what extent do we consistently deliver our services on time?

To no extent

To some extent

Neutral

To a great extent

To a very great extent

Store Miles

Library: Multiple Choice

How far do you live from the nearest store?

Less than 5 miles

5 to 10 miles

11 to 20 miles

21 to 30 miles

31 to 40 miles

41 or more miles

Suggestions (1-5)

Library: Short Answer

What suggestions do you have for improvement?

Time Services

Library: Multiple Choice

When working with our company, to what extent do we deliver our services on time?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Timeliness

Library: Multiple Choice

How satisfied are you with our timeliness?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

Understanding Needs

Library: Multiple Choice

How satisfied are you with our understanding of your needs?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

Value vs. Cost

Library: Multiple Choice

When working with our company, to what extent do we provide considerable value for the cost?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Work Industry

Library: Multiple Choice

What industry are you in?

Tourism
Business Services
Retail
Wholesale
Financial Service
Manufacturing
Professional Service
Health Service
Computing/Information/Technology
Transportation
Farming/Agriculture
Construction
Hospitality
Other

Predefined Surveys

The following section lists the predefined surveys available in RightNow Metrics.

Services Branching Example 1

1. How long have you been our customer?

   Less than 1 year
   1 to 3 years
   4 to 7 years
   8 to 11 years
   12 to 15 years
   16 to 20 years
   21 to 25 years
   More than 25 years

2. How did you hear about us?

   Word of Mouth
   Advertisement
   Newspaper
   Magazine Article
   Direct Mail
   At an Exposition
   TV Commercial
   Radio
   The Internet
   Other

3. How satisfied are you with our customer service courteousness?

   Very Satisfied
   Somewhat Satisfied
   No Opinion
   Somewhat Unsatisfied
   Very Unsatisfied

4. What suggestions do you have for improvement?
5. How satisfied are you with our customer service responsiveness?

   Very Satisfied
   Somewhat Satisfied
   No Opinion
   Somewhat Unsatisfied
   Very Unsatisfied

6. What suggestions do you have for improvement?

7. How satisfied are you with our customer service problem resolution/recovery?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

8. What suggestions do you have for improvement?

9. When working with our company, to what extent do we provide high quality services?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

10. What suggestions do you have for improvement?

11. When working with our company, to what extent is our ability to resolve problems meeting your expectations?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

12. What suggestions do you have for improvement?

13. When working with our company, to what extent is our company easy to do business with?

    To no extent
    To some extent
    Neutral
    To a great extent
    To a very great extent

14. What suggestions do you have for improvement?

Services Branching Example 2

1. Approximately how often do you purchase from our company?

    Never
    3 to 4 times a year
    Once or twice a month
    More than once a week
    Once a week

2. How did you hear about us?

    Word of Mouth
    Advertisement
    Newspaper
    Magazine Article
    Direct Mail
    At an Exposition
    TV Commercial
    Radio
    The Internet
    Other

3. How satisfied are you with our service availability?

    Very Satisfied
    Somewhat Satisfied
    No Opinion
    Somewhat Unsatisfied
    Very Unsatisfied

4. What suggestions do you have for improvement?

5. How satisfied are you with our timeliness?

    Very Satisfied
    Somewhat Satisfied
    No Opinion
    Somewhat Unsatisfied
    Very Unsatisfied

6. What suggestions do you have for improvement?

7. How satisfied are you with our understanding of your needs?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

8. What suggestions do you have for improvement?

9. When working with our company, to what extent do we provide reliable services?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

10. What suggestions do you have for improvement?

11. When working with our company, to what extent do we deliver our services on time?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

12. What suggestions do you have for improvement?

13. When working with our company, to what extent is the flexibility of our business practices meeting your expectations?

    To no extent
    To some extent
    Neutral
    To a great extent
    To a very great extent

14. What suggestions do you have for improvement?

Services Branching Example 3

1. What is your age?

   Under 20
   21 to 25 years
   26 to 30 years
   31 to 35 years
   36 to 40 years
   41 to 45 years
   46 to 50 years
   51 to 55 years
   56 to 60 years
   61 to 65 years
   Over 65 years

2. How did you hear about us?

   Word of Mouth
   Advertisement
   Newspaper
   Magazine Article
   Direct Mail
   At an Exposition
   TV Commercial
   Radio
   The Internet
   Other

3. When working with our company, to what extent do we provide high quality services?

   To no extent
   To some extent
   Neutral
   To a great extent
   To a very great extent

4. What suggestions do you have for improvement?
5. When working with our company, to what extent is the price competitiveness of our services meeting your expectations?

   To no extent

   To some extent

   Neutral

   To a great extent

   To a very great extent
6. What suggestions do you have for improvement?
7. When working with our company, to what extent do we provide considerable value for the cost?

   To no extent

   To some extent

   Neutral

   To a great extent

   To a very great extent
8. What suggestions do you have for improvement?
9. When working with our company, to what extent is our responsiveness to your requests meeting your expectations?

   To no extent

   To some extent

   Neutral

   To a great extent

   To a very great extent
10. What suggestions do you have for improvement?

11. When working with our company, to what extent do we consistently deliver our services on time?

    To no extent
    To some extent
    Neutral
    To a great extent
    To a very great extent

12. What suggestions do you have for improvement?

13. When working with our company, to what extent do you believe that we are committed to excellent communication with our customers?

    To no extent
    To some extent
    Neutral
    To a great extent
    To a very great extent

14. What suggestions do you have for improvement?

Services Example 1

1. How long have you been our customer?

   Less than 1 year
   1 to 3 years
   4 to 7 years
   8 to 11 years
   12 to 15 years
   16 to 20 years
   21 to 25 years
   More than 25 years

2. How satisfied are you with our customer service courteousness?

   Very Satisfied
   Somewhat Satisfied
   No Opinion
   Somewhat Unsatisfied
   Very Unsatisfied

3. How satisfied are you with our customer service responsiveness?

   Very Satisfied
   Somewhat Satisfied
   No Opinion
   Somewhat Unsatisfied
   Very Unsatisfied

4. How satisfied are you with our customer service problem resolution/recovery?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

5. When working with our company, to what extent do we provide high quality services?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

6. When working with our company, to what extent is our ability to resolve problems meeting your expectations?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

7. When working with our company, to what extent is our company easy to do business with?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Services Example 2

1. Approximately how often do you purchase from our company?

Never
3 to 4 times a year
Once or twice a month
More than once a week
Once a week

2. How satisfied are you with our service availability?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

3. How satisfied are you with our timeliness?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

4. How satisfied are you with our understanding of your needs?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

5. When working with our company, to what extent do we provide reliable services?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

6. When working with our company, to what extent do we deliver our services on time?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

7. When working with our company, to what extent is the flexibility of our business practices meeting your expectations?

   To no extent
   To some extent
   Neutral
   To a great extent
   To a very great extent

Services Example 3

1. What is your age?

   Under 20
   21 to 25 years
   26 to 30 years
   31 to 35 years
   36 to 40 years
   41 to 45 years
   46 to 50 years
   51 to 55 years
   56 to 60 years
   61 to 65 years
   Over 65 years

2. How did you hear about our products?

   Word of Mouth
   Advertisement
   Newspaper
   Magazine Article
   Direct Mail
   At an Exposition
   TV Commercial
   Radio
   The Internet
   Other

3. When working with our company, to what extent do we provide high quality services?

   To no extent
   To some extent
   Neutral
   To a great extent
   To a very great extent

4. When working with our company, to what extent is the price competitiveness of our services meeting your expectations?

   To no extent
   To some extent
   Neutral
   To a great extent
   To a very great extent

5. When working with our company, to what extent do we provide considerable value for the cost?

   To no extent
   To some extent
   Neutral
   To a great extent
   To a very great extent

6. When working with our company, to what extent is our responsiveness to your requests meeting your expectations?

   To no extent
   To some extent
   Neutral
   To a great extent
   To a very great extent

7. When working with our company, to what extent do we consistently deliver our services on time?

   To no extent
   To some extent
   Neutral
   To a great extent
   To a very great extent

8. When working with our company, to what extent do you believe that we are committed to excellent communication with our customers?

   To no extent
   To some extent
   Neutral

To a great extent
To a very great extent

Services Example 4

1. What industry are you in?

Tourism
Business Services
Retail
Wholesale
Financial Service
Manufacturing
Professional Service
Health Service
Computing / Information / Technology
Transportation
Farming / Agriculture
Construction
Hospitality
Other

2. How long have you been our customer?

Less than 1 year
1 to 3 years
4 to 7 years
8 to 11 years
12 to 15 years
16 to 20 years
21 to 25 years
More than 25 years

3. How satisfied are you with our service availability?

   Very Satisfied

   Somewhat Satisfied

   No Opinion

   Somewhat Unsatisfied

   Very Unsatisfied

4. When working with our company, to what extent do we provide considerable value for the cost?

   To no extent

   To some extent

   Neutral

   To a great extent

   To a very great extent

5. How satisfied are you with our customer service responsiveness?

   Very Satisfied

   Somewhat Satisfied

   No Opinion

   Somewhat Unsatisfied

   Very Unsatisfied

6. When working with our company, to what extent is our company easy to do business with?

   To no extent

   To some extent

   Neutral

   To a great extent

   To a very great extent

7. When working with our company, to what extent do we provide high quality services?

   To no extent

   To some extent

   Neutral

   To a great extent

   To a very great extent

8. When working with our company, to what extent is the price competitiveness of our services meeting your expectations?

   To no extent

   To some extent

   Neutral

   To a great extent

   To a very great extent

9. When working with our company, to what extent are we responsive to your requests?

   To no extent
   To some extent
   Neutral
   To a great extent
   To a very great extent

10. How satisfied are you with our understanding of your needs?

    Very Satisfied
    Somewhat Satisfied
    No Opinion
    Somewhat Unsatisfied
    Very Unsatisfied

Cust Support Example

1. How satisfied are you with our response time to your specific question?

   Very Satisfied
   Somewhat Satisfied
   No Opinion
   Somewhat Unsatisfied
   Very Unsatisfied

2. How satisfied are you that our help desk support staff are sufficiently knowledgeable and professional?

   Very Satisfied
   Somewhat Satisfied
   No Opinion
   Somewhat Unsatisfied
   Very Unsatisfied

3. How satisfied are you with communications and follow-up on problem resolutions?

   Very Satisfied
   Somewhat Satisfied
   No Opinion
   Somewhat Unsatisfied
   Very Unsatisfied

4. Please rate the overall performance of our entire Customer Services Organization (Support, Training, Installation and Documentation). (1=poor, 5=excellent)

   1
   2
   3
   4

5

5. Please tell us what we should do to improve the quality of support we provide to you and your organization.

Customer Support Example

1. How satisfied are you with our response time to your specific question?

Very Satisfied

Somewhat Satisfied

No Opinion

Somewhat Unsatisfied

Very Unsatisfied

2. How satisfied are you that our help desk support staff are sufficiently knowledgeable and professional?

Very Satisfied

Somewhat Satisfied

No Opinion

Somewhat Unsatisfied

Very Unsatisfied

3. How satisfied are you with communications and follow-up on problem resolutions?

Very Satisfied

Somewhat Satisfied

No Opinion

Somewhat Unsatisfied

Very Unsatisfied

4. Please rate the overall performance of our entire Customer Services Organization (Support, Training, Installation and Documentation). (1=poor, 5=excellent)

1

2

3

4

5

5. Please tell us what we should do to improve the quality of support we provide to you and your organization.

Service Example 1 Branch Close

1. What is your age?

Under 20

21 to 25 years

26 to 30 years

31 to 35 years

36 to 40 years
41 to 45 years
46 to 50 years
51 to 55 years
56 to 60 years
61 to 65 years
Over 65 years

2. How did you hear about us?

Word of Mouth
Advertisement
Newspaper
Magazine Article
Direct Mail
At an Exposition
TV Commercial
Radio
The Internet
Other

3. When working with our company, to what extent do we provide high quality services?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

4. What suggestions do you have for improvement?

5. When working with our company, to what extent is the price competitiveness of our services meeting your expectations?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

6. What suggestions do you have for improvement?

7. When working with our company, to what extent do we provide considerable value for the cost?

To no extent
To some extent
Neutral
To a great extent

To a very great extent

8. What suggestions do you have for improvement?
9. When working with our company, to what extent is our responsiveness to your requests meeting your expectations?

   To no extent

   To some extent

   Neutral

   To a great extent

   To a very great extent
10. What suggestions do you have for improvement?
11. When working with our company, to what extent do we consistently deliver our services on time?

   To no extent

   To some extent

   Neutral

   To a great extent

   To a very great extent
12. What suggestions do you have for improvement?
13. When working with our company, to what extent do you believe that we are committed to excellent communication with our customers?

   To no extent

   To some extent

   Neutral

   To a great extent

   To a very great extent
14. What suggestions do you have for improvement?

Service Example 1 Closed Incident

1. What is your age?

   Under 20

   21 to 25 years

   26 to 30 years

   31 to 35 years

   36 to 40 years

   41 to 45 years

   46 to 50 years

   51 to 55 years

   56 to 60 years

   61 to 65 years

Over 65 years

2. How did you hear about our products?

Word of Mouth
Advertisement
Newspaper
Magazine Article
Direct Mail
At an Exposition
TV Commercial
Radio
The Internet
Other

3. When working with our company, to what extent do we provide high quality services?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

4. When working with our company, to what extent is the price competitiveness of our services meeting your expectations?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

5. When working with our company, to what extent do we provide considerable value for the cost?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

6. When working with our company, to what extent is our responsiveness to your requests meeting your expectations?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

7. When working with our company, to what extent do we consistently deliver our services on time?

   To no extent
   To some extent
   Neutral
   To a great extent
   To a very great extent

8. When working with our company, to what extent do you believe that we are committed to excellent communication with our customers?

   To no extent
   To some extent
   Neutral
   To a great extent
   To a very great extent

Service Example 1 On-Demand

1. Approximately how often do you purchase from our company?

   Never
   3 to 4 times a year
   Once or twice a month
   More than once a week
   Once a week

2. How satisfied are you with our service availability?

   Very Satisfied
   Somewhat Satisfied
   No Opinion
   Somewhat Unsatisfied
   Very Unsatisfied

3. How satisfied are you with our timeliness?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

4. How satisfied are you with our understanding of your needs?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

5. When working with our company, to what extent do we provide reliable services?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

6. When working with our company, to what extent do we deliver our services on time?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

7. When working with our company, to what extent is the flexibility of our business practices meeting your expectations?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

Service Example 1 On-Demand Br

1. Approximately how often do you purchase from our company?

Never
3 to 4 times a year
Once or twice a month
More than once a week
Once a week

2. How did you hear about us?

Word of Mouth
Advertisement
Newspaper
Magazine Article
Direct Mail
At an Exposition
TV Commercial
Radio
The Internet
Other

3. How satisfied are you with our service availability?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

4. What suggestions do you have for improvement?

5. How satisfied are you with our timeliness?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

6. What suggestions do you have for improvement?

7. How satisfied are you with our understanding of your needs?

Very Satisfied
Somewhat Satisfied
No Opinion
Somewhat Unsatisfied
Very Unsatisfied

8. What suggestions do you have for improvement?

9. When working with our company, to what extent do we provide reliable services?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

10. What suggestions do you have for improvement?

11. When working with our company, to what extent do we deliver our services on time?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

12. What suggestions do you have for improvement?

13. When working with our company, to what extent is the flexibility of our business practices meeting your expectations?

To no extent
To some extent
Neutral
To a great extent
To a very great extent

14. What suggestions do you have for improvement?

Database Schema Tables

This appendix describes the schema tables of the database underlying RightNow Metrics. The tables include the associated columns; the datatype including varchar2 (character, date, number, or clob (character byte objects)); and the null value which indicates if the field is required.

To view and print the specific table structure for RightNow Metrics, execute **rnm_baudit -S <view_name>** for all tables or **rnm_dbaudit -s <table_name> <view_name>** for a particular table.

Schema Tables

The following sections include attribute information about each RightNow Metrics table.

Table D-1: Entity Summary Report

Entity Name	# Attr
surv_sv_branches	7
surv_sv_check_all	3
surv_sv_multiple_choices	3
surv_sv_pages	5
surv_sv_question_ranges	4
surv_sv_questions	12
surv_sv_templates	16
survey_addresses	6
survey_branches	7
survey_check_all	3
survey_ci_rules	5
survey_generic_questions	6
survey_multiple_choices	3
survey_notification	3
survey_pages	5

Table D-1: Entity Summary Report (Continued)

Entity Name	# Attr
survey_population	15
survey_quest_lib	3
survey_question_ranges	4
survey_questions	7
survey_responses	4
survey_score_quest	5
survey_score_result	6
survey_surveys	13
survey_templates	16
survey_usage	5
survey_usage_archive	5

Table D-2: surv_sv_branches

Attribute/Logical Rolename	Datatype	Null
branch_id	numeric(10, 0)	N
page_id	numeric(10, 0)	N
test_question_id	numeric(10, 0)	N
test_answer	varchar(4000)	Y
target_page_num	numeric(10, 0)	N
branch_order	numeric(10, 0)	N
branch_type	numeric(10, 0)	N

Table D-3: surv_sv_check_all

Attribute/Logical Rolename	Datatype	Null
question_id	numeric(10, 0)	N

Table D-3: surv_sv_check_all (Continued)

Attribute/Logical Rolename	Datatype	Null
selection	char(80)	N
selection_order	numeric(3, 0)	N

Table D-4: surv_sv_multiple_choices

Attribute/Logical Rolename	Datatype	Null
question_id	numeric(10, 0)	N
choice	char(80)	N
choice_order	numeric(3, 0)	N

Table D-5: surv_sv_pages

Attribute/Logical Rolename	Datatype	Null
page_id	numeric(10, 0)	N
template_id	numeric(10, 0)	N
web_page_top	text	Y
web_page_bottom	text	Y
page_order	numeric(10, 0)	N

Table D-6: surv_sv_question_ranges

Attribute/Logical Rolename	Datatype	Null
question_id	numeric(10, 0)	N
range_from	numeric(10, 0)	N
range_to	numeric(10, 0)	N
range_step	numeric(10, 0)	N

Table D-7: surv_sv_questions

Attribute/Logical Rolename	Datatype	Null
question_id	numeric(10, 0)	N
question_name	char(80)	N
question_text	varchar(4000)	Y
question_type	numeric(3, 0)	N
question_attributes	numeric(10, 0)	N
question_required	numeric(10, 0)	N
question_display	numeric(10, 0)	N
template_id	numeric(10, 0)	N
question_order	numeric(3, 0)	N
page_id	numeric(10, 0)	N
results_order	numeric(3, 0)	N
graph_type	numeric(3, 0)	N

Table D-8: surv_sv_templates

Attribute/Logical Rolename	Datatype	Null
template_id	numeric(10, 0)	N
template_name	char(30)	Y
template_type	numeric(3, 0)	Y
email_subject	varchar(80)	Y
email_reply	varchar(40)	Y
email_from	varchar(40)	Y
mail_server	varchar(60)	Y
email_username	varchar(40)	Y
email_password	varchar(35)	Y
email_intro	varchar(4000)	Y

Table D-8: surv_sv_templates (Continued)

Attribute/Logical Rolename	Datatype	Null
email_trailer	varchar(4000)	Y
submit_option	numeric(10, 0)	Y
web_survey_top	text	Y
web_survey_bottom	text	Y
web_survey_submit	text	Y
web_survey_style	numeric(10, 0)	N

Table D-9: survey_addresses

Attribute/Logical Rolename	Datatype	Null
address_id	numeric(10, 0)	N
email	varchar(40)	N
last_sent	numeric(10, 0)	Y
num_sent	numeric(10, 0)	Y
num_replied	numeric(10, 0)	Y
opt_out	numeric(3, 0)	Y

Table D-10: survey_branches

Attribute/Logical Rolename	Datatype	Null
branch_id	numeric(10, 0)	N
page_id	numeric(10, 0)	N
test_question_id	numeric(10, 0)	N
test_answer	varchar(4000)	Y
target_page_num	numeric(10, 0)	N
branch_order	numeric(10, 0)	N
branch_type	numeric(10, 0)	N

Table D-11: survey_check_all

Attribute/Logical Rolename	Datatype	Null
question_id	numeric(10, 0)	N
selection	char(80)	N
selection_order	numeric(3, 0)	N

Table D-12: survey_ci_rules

Attribute/Logical Rolename	Datatype	Null
ci_rules_id	numeric(10, 0)	N
survey_id	numeric(10, 0)	N
ci_rules_order	numeric(10, 0)	N
choice	char(80)	N
value	char(80)	N

Table D-13: survey_generic_questions

Attribute/Logical Rolename	Datatype	Null
question_id	numeric(10, 0)	N
library_id	numeric(10, 0)	N
question_name	char(80)	N
question_text	varchar(4000)	Y
question_type	numeric(3, 0)	N
question_attributes	numeric(10, 0)	N

Table D-14: survey_multiple_choices

Attribute/Logical Rolename	Datatype	Null
question_id	numeric(10, 0)	N
choice	char(80)	N
choice_order	numeric(3, 0)	N

Table D-15: survey_notification

Attribute/Logical Rolename	Datatype	Null
notification_id	numeric(10, 0)	N
notify_name	varchar(30)	N
email	varchar(40)	N

Table D-16: survey_pages

Attribute/Logical Rolename	Datatype	Null
page_id	numeric(10, 0)	N
template_id	numeric(10, 0)	N
web_page_top	text	Y
web_page_bottom	text	Y
page_order	numeric(10, 0)	N

Table D-17: survey_population

Attribute/Logical Rolename	Datatype	Null
survey_id	numeric(10, 0)	N
email	varchar(40)	N

Table D-17: survey_population (Continued)

Attribute/Logical Rolename	Datatype	Null
sent	numeric(10, 0)	Y
received	numeric(10, 0)	Y
valid	numeric(3, 0)	Y
schedule	numeric(10, 0)	N
response_id	numeric(10, 0)	N
ref_no	char(15)	N
inc_title	varchar(80)	Y
inc_product	varchar(40)	Y
inc_subproduct	varchar(40)	Y
inc_category	varchar(40)	Y
inc_subcategory	varchar(40)	Y
inc_assigned	varchar(20)	Y
inc_group	varchar(20)	Y

Table D-18: survey_quest_lib

Attribute/Logical Rolename	Datatype	Null
library_id	numeric(10, 0)	N
library_name	char(80)	N
library_desc	varchar(4000)	Y

Table D-19: survey_question_ranges

Attribute/Logical Rolename	Datatype	Null
question_id	numeric(10, 0)	N
range_from	numeric(10, 0)	N
range_to	numeric(10, 0)	N

Table D-19: survey_question_ranges (Continued)

Attribute/Logical Rolename	Datatype	Null
range_step	numeric(10, 0)	N

Table D-20: survey_questions

Attribute/Logical Rolename	Datatype	Null
template_id	numeric(10, 0)	N
page_id	numeric(10, 0)	N
question_id	numeric(10, 0)	N
gen_quest_id	numeric(10, 0)	N
question_order	numeric(3, 0)	N
question_required	numeric(3, 0)	Y
question_display	numeric(3, 0)	Y

Table D-21: survey_responses

Attribute/Logical Rolename	Datatype	Null
question_id	numeric(10, 0)	N
response_id	numeric(10, 0)	N
survey_id	numeric(10, 0)	N
value	varchar(4000)	Y

Table D-22: survey_score_quest

Attribute/Logical Rolename	Datatype	Null
question_score_id	numeric(10, 0)	N
question_id	numeric(10, 0)	N
response_value	varchar(4000)	N

Table D-22: survey_score_quest (Continued)

Attribute/Logical Rolename	Datatype	Null
score_value	numeric(10, 0)	N
notification_id	numeric(10, 0)	N

Table D-23: survey_score_result

Attribute/Logical Rolename	Datatype	Null
score_result_id	numeric(10, 0)	N
survey_id	numeric(10, 0)	N
score_type	numeric(10, 0)	N
score_value	numeric(10, 0)	N
score_operator	numeric(10, 0)	N
notification_id	numeric(10, 0)	N

Table D-24: survey_surveys

Attribute/Logical Rolename	Datatype	Null
survey_id	numeric(3, 0)	N
template_id	numeric(3, 0)	Y
survey_name	varchar(30)	N
survey_type	numeric(3, 0)	Y
tracking	numeric(3, 0)	Y
schedule	numeric(10, 0)	Y
priority	numeric(3, 0)	Y
active	numeric(3, 0)	Y
launched	numeric(3, 0)	Y
sample_percent	numeric(3, 0)	Y
sent_count	numeric(10, 0)	Y

Table D-24: survey_surveys (Continued)

Attribute/Logical Rolename	Datatype	Null
result_link	numeric(3, 0)	Y
option_flags	numeric(10, 0)	Y

Table D-25: survey_templates

Attribute/Logical Rolename	Datatype	Null
template_id	numeric(10, 0)	N
template_name	char(30)	N
template_type	numeric(3, 0)	Y
email_subject	varchar(80)	Y
email_reply	varchar(40)	Y
email_from	varchar(40)	Y
mail_server	varchar(60)	Y
email_username	varchar(40)	Y
email_password	varchar(35)	Y
email_intro	varchar(4000)	Y
email_trailer	varchar(4000)	Y
submit_option	numeric(10, 0)	N
web_survey_top	text	Y
web_survey_bottom	text	Y
web_survey_submit	text	Y
web_survey_style	numeric(10, 0)	N

Table D-26: survey_usage

Attribute/Logical Rolename	Datatype	Null
su_date	numeric(10, 0)	N

Table D-26: survey_usage (Continued)

Attribute/Logical Rolename	Datatype	Null
ci_sent	numeric(10, 0)	Y
ci_received	numeric(10, 0)	Y
od_sent	numeric(10, 0)	Y
od_received	numeric(10, 0)	Y

Table D-27: survey_usage_archive

Attribute/Logical Rolename	Datatype	Null
su_date	numeric(10, 0)	N
ci_sent	numeric(10, 0)	Y
ci_received	numeric(10, 0)	Y
od_sent	numeric(10, 0)	Y
od_received	numeric(10, 0)	Y

Table D-28: Key Summary Report

Entity Name	Key Name	Key Type	Unique
surv_sv_branches	surv_sv_branches_idx	Alternate Key	Y
surv_sv_check_all	surv_sv_check_all_idx	Alternate Key	Y
surv_sv_multiple_choices	surv_sv_multiple_choices_idx	Alternate Key	Y
surv_sv_pages	surv_sv_pages_idx	Alternate Key	Y
surv_sv_question_ranges	surv_sv_question_ranges_idx	Alternate Key	Y
surv_sv_questions	surv_sv_questions_idx	Alternate Key	Y
surv_sv_templates	surv_sv_templates_idx	Alternate Key	Y
survey_addresses	survey_addresses_idx	Alternate Key	Y
survey_branches	survey_branches_idx	Alternate Key	Y
survey_check_all	survey_check_all_idx	Alternate Key	Y

Table D-28: Key Summary Report (Continued)

Entity Name	Key Name	Key Type	Unique
survey_ci_rules	survey_ci_rules_idx	Alternate Key	Y
survey_generic_questions	survey_generic_questions_idx	Alternate Key	Y
survey_multiple_choices	survey_multiple_choices_idx	Alternate Key	Y
survey_notification	survey_notification_idx	Alternate Key	Y
survey_pages	survey_pages_idx	Alternate Key	Y
survey_population	survey_population_idx	Inversion Entry	N
survey_population	survey_population_idx2	Alternate Key	Y
survey_population	survey_population_idx3	Inversion Entry	N
survey_quest_lib	survey_quest_lib_idx	Alternate Key	Y
survey_question_ranges	survey_question_ranges_idx	Alternate Key	Y
survey_questions	survey_questions_idx	Alternate Key	Y
survey_responses	survey_responses_idx	Alternate Key	Y
survey_score_quest	survey_score_quest_idx	Alternate Key	Y
survey_score_result	survey_score_result_idx	Alternate Key	Y
survey_surveys	survey_surveys_idx	Alternate Key	Y
survey_templates	survey_templates_idx	Alternate Key	Y
survey_usage	survey_usage_idx	Alternate Key	Y
survey_usage_archive	survey_usage_archive_idx	Alternate Key	Y

Table D-29: surv_sv_branches_idx

Key Name	surv_sv_branches_idx
Keys	branch_id

Table D-30: surv_sv_check_all_idx

Key Name	surv_sv_check_all_idx
Keys	question_id,selection

Table D-31: surv_sv_multiple_choices_idx

Key Name	surv_sv_multiple_choices_idx
Keys	question_id,choice

Table D-32: surv_sv_pages_idx

Key Name	surv_sv_pages_idx
Keys	page_id

Table D-33: surv_sv_question_ranges_idx

Key Name	surv_sv_question_ranges_idx
Keys	question_id

Table D-34: surv_sv_questions_idx

Key Name	surv_sv_questions_idx
Keys	question_id

Table D-35: surv_sv_templates_idx

Key Name	surv_sv_templates_idx
Keys	template_id

Table D-36: survey_addresses_idx

Key Name	survey_addresses_idx
Keys	address_id,email

Table D-37: survey_branches_idx

Key Name	survey_branches_idx
Keys	branch_id

Table D-38: survey_check_all_idx

Key Name	survey_check_all_idx
Keys	question_id,selection

Table D-39: survey_ci_rules_idx

Key Name	survey_ci_rules_idx
Keys	ci_rules_id

Table D-40: survey_generic_questions_idx

Key Name	survey_generic_questions_idx
Keys	question_id,library_id

Table D-41: survey_multiple_choices_idx

Key Name	survey_multiple_choices_idx
Keys	question_id,choice

Table D-42: survey_notification_idx

Key Name	survey_notification_idx
Keys	notification_id

Table D-43: survey_pages_idx

Key Name	survey_pages_idx
Keys	page_id

Table D-44: survey_population_idx

Key Name	survey_population_idx
Keys	survey_id,email

Table D-45: survey_population_idx2

Key Name	survey_population_idx2
Keys	response_id

Table D-46: survey_population_idx3

Key Name	survey_population_idx3
Keys	ref_no

Table D-47: survey_quest_lib_idx

Key Name	survey_quest_lib_idx
Keys	library_id

Table D-48: survey_question_ranges_idx

Key Name	survey_question_ranges_idx
Keys	question_id

Table D-49: survey_questions_idx

Key Name	survey_questions_idx
Keys	template_id,page_id,question_id

Table D-50: survey_responses_idx

Key Name	survey_responses_idx
Keys	question_id,response_id

Table D-51: survey_score_quest_idx

Key Name	survey_score_quest_idx
Keys	question_score_id,question_id

Table D-52: survey_score_result_idx

Key Name	survey_score_result_idx
Keys	score_result_id,survey_id

Table D-53: survey_surveys_idx

Key Name	survey_surveys_idx
Keys	survey_id

Table D-54: survey_templates_idx

Key Name	survey_templates_idx
Keys	template_id

Table D-55: survey_usage_idx

Key Name	survey_usage_idx
Keys	su_date

Table D-56: survey_usage_archive_idx

Key Name	survey_usage_archive_idx
Keys	su_date

Glossary

Active Surveys—The entrance page into RightNow Metrics**.** The Active Surveys page is the central location for monitoring and viewing survey results and working with launched surveys. Surveys can also be created from Active Surveys using the Creating Survey wizard.

Addresses—A console in RightNow Metrics for accessing an organization's surveys mailing list. The Addresses page displays a list of all email addresses that have received surveys or links to surveys, the date the last survey was sent, how many surveys have been sent to each address, and how many responses have been received.

Anonymous tracking—An option in an On-Demand survey distributed as an email link or an email HTML. In Anonymous tracking, the email addresses of the respondents are not necessary for them to respond to the survey; therefore, the list of respondents' email addresses is not stored in the database.

AT command—A Windows NT/2000 command used to schedule when processes, including utilities, are automatically run.

Branching layout—A layout type that directs the flow of questions based on the responses chosen by survey participants. Incorporating Web-based tree logic, this layout type enables branches and pages to be created that include more than one line or branch of questions. Branches can be created for range and multiple choice questions.

CRM—Customer relationship management. All of the tools, technologies, and procedures to manage, improve, or facilitate sales, support, and related interactions with customers, prospects, and business partners throughout the enterprise. Essentially, any and all technologies, processes, and procedures that facilitate or support sales and marketing functions can now be identified with CRM. RightNow Metrics can be integrated with RightNow eService Center or other CRM products.

CSR—*See* customer service representative.

CSV—comma separated value. A file format with commas separating one value from the next. Survey results can be output in CSV format to import into most other applications for further analysis.

Category—A classification assigned to answers and incidents. All answers and incidents in the knowledge base can be classified under a single category and subcategory, and answers can be classified under multiple categories.

Check all —A question type that has a number of specified answer choices from which the respondent can check all answers that apply.

Closed-Incident survey—A survey that is automatically emailed to customers after the questions they submit have been answered and their incidents have been solved by a customer service representative. Closed-Incident surveys can be used when RightNow Metrics is integrated with RightNow eService Center or another customer relationship management package. This type of survey provides automatic customer feedback and then instantly tabulates and displays the results.

Configuration—A tab on most RightNow Metrics pages used to access the configuration settings for customizing the functionality of RightNow Metrics.

Cookie—Information that is stored by the server on the client side of a client/server communication. Typically, a cookie records user preferences when accessing a particular site. RightNow eService Center uses cookies for both end-users on the end-user side and administrators, customer service representatives, and other staff members on the administration side. Cookies must be enabled in the individual's Web browser to take advantage of this feature.

Creating Library wizard—An interactive process for creating libraries in RightNow Metrics. Libraries organize and store questions in the database.

Creating Question wizard—An interactive process for creating questions in RightNow Metrics.

Creating Survey wizard—An interactive process for creating surveys in RightNow Metrics.

Crontab—A UNIX command used to schedule when processes, including utilities, are automatically run.

Crontabfile—A file that contains and stores the scheduled processes.

Customer—A Web user who accesses and uses a site on which RightNow Metrics is installed.
Also called *end-user*.

Customer service representative (CSR)—A staff member responsible for responding to and solving incidents and maintaining customer information.

Database—The tables and data structure in RightNow Metrics that maintain, store, and retrieve information.

Distribution method—A means of sending surveys to customers. RightNow Metrics provides three distribution methods: Email, Email HTML, and Email Link.

eCRM—Web-based customer relationship management. *See* CRM.

Email—A method for distributing surveys. Surveys distributed as email are sent to participants as plain text through email. Respondents do not need a Web browser to answer email surveys; they simply reply to the email by entering the number of their choice or short answer in the space below the question and options.

Email HTML—A method for distributing surveys in an email that contains either an ASCII text URL for the survey or a Web version of the survey. If the customer's email client is capable of displaying HTML, the customer will see the survey. If the customer's email client does not support this functionality, the customer will see the ASCII text URL.

Email Link—A method for distributing surveys in which surveys are displayed on a Web page. Links to surveys can be sent in email, placed on a Web page, and built into a hyperlink for accessing a Web page.

Email notification—An email alert sent to specified staff members as the result of a notification rule.
Also called *notification*.
See also notification rule.

eService—Web-based customer service.

End-user—*See* customer.

Halted—A survey status used to restrict both the sending of more surveys and the receiving of more survey responses. Staff members choose this status when they want to terminate an On-Demand or Closed-Incident survey but still want access to the survey results.

Help—A drop-down menu on all RightNow Metrics pages that contains online help options.

IMP file—Import file. A data file with an extension of .imp that is used by the *gimport* utility to map values in the CSV file to columns in the Metrics database.

Incident—Any question or request for help from an end-user through Ask a Question or email inquiries, Live chat sessions, site or answer feedback, or inquiries from external sources using eService Center's published Application Program Interface; a question or issue that has been entered into the Incident Console and, once solved, can be proposed as an answer.

langcvt—A utility for changing the language pack in RightNow Metrics from English to the language of the pack. A language pack is a separate download that can be installed after RightNow Metrics has been installed.

Launching a survey—The process of defining the characteristics of a survey, including the type of survey, how the survey will be sent (what method of distribution), and when it will be sent.

Launching Survey wizard—An interactive process for launching a survey, including defining survey settings, choosing the distribution method, and choosing when the survey will be sent.

Message bases—A component that provides international language support and allows customization of the headings, labels, and text on RightNow Metrics pages.

Metrics Login—The login page in RightNow Metrics that is displayed after the URL of the RightNow Metrics application is entered.

msgtool—A utility for creating a configuration report for an eService Center site, or for changing configuration settings when an error has been made in one of the settings that subsequently locks staff members out of the Configuration Editor.

Multiple choice—A question type in RightNow Metrics that has a limited number of specified answer choices from which the participant can choose only one. Multiple choice questions are used to limit the responses to a specific set of answer choices. Branches can be added to multiple choice questions to direct the flow of questions so that participants do not have to answer questions that are not relevant to them.
See also range.

Multiple-page layout—A layout type that contains more than one page. Multiple-page surveys contain one line of questions and can be effective in breaking up large surveys into manageable groups.

Notification Console—A console in RightNow Metrics for creating and modifying email addresses used in email notifications.
See also email notification.

Notification rule—A rule that defines under what criteria an email notification will be sent to staff members. Notification rules can be used with the scoring feature to notify staff members when an overall survey score or individual question score is unusually high or low. Notification rules can also be used to notify staff members when there are problems with the network, server, mailbox, or password when sending or receiving surveys.
See also scoring.

On-Demand survey—A survey for measuring customer satisfaction, opinions, product intelligence, or any other area of interest. On-demand surveys can be created for RightNow Metrics installed in either standalone mode or as an add-on module to RightNow eService Center. On-demand surveys can be part of a Web site or emailed to customers.

Opt in/opt out—A feature that controls who receives an email survey or a link to a Web-based survey. This feature allows staff members to remove email addresses from receiving surveys. RightNow Metrics also enables survey participants to remove their email address from the list of recipients by either replying to an email survey with ‘remove’ in the subject line, or by selecting the link that is included in the email for surveys distributed as email links and email HTML.

Page—A Web page; a page in a RightNow Metrics application.

pollster—A utility in RightNow Metrics that sends email-based surveys and invitations to Web-based surveys. The pollster utility also retrieves replies to email surveys.

Predefined answers—A set of answer choices in RightNow Metrics that can be used when creating multiple choice questions.

Product—A classification assigned to answers and incidents based on the products offered by an organization. All answers and incidents in the knowledge base can be classified under a single product, subproduct, category, and sub-category; answers can be classified under multiple products and categories.

Question Library—A function on the Questions page for organizing and storing questions in the database.

Questions—A console in RightNow Metrics that displays the entire list of questions, each question’s type, and which library each question is stored in. From the Questions page, questions can be created, edited, and copied. Libraries can also be created and updated from the Questions page.

Range—A question type that has a specified range of answer choices. Range questions commonly pertain to rating product satisfaction or the performance of a customer service representative. Branches can be added to range questions to direct the flow of questions so that participants do not have to answer questions that are not relevant to them.

Receiving—A survey status used to allow survey responses to be received. This status will restrict any more surveys from being sent. Staff members choose this status for an on-going On-Demand survey and when they want to end a Closed-Incident survey but do not want to restrict people from submitting responses.

Reports—Preformatted reports that display survey results in graphical and tabular formats and can be exported as raw data or read by the Adobe Acrobat Reader and other readers. Additional reports include the email addresses of survey recipients and respondents, survey URLs, and scoring results.

Results—Survey results can be displayed in graphical and tabular formats, or output as raw data in comma separated value (CSV) format or using the PostScript printer description language, which can be read by the

Adobe Acrobat Reader and other readers. On-Demand survey results can be queried by date; Closed-Incident survey results can be queried by the fields that correspond with fields contained in the trigger email sent by RightNow eService Center or another customer relationship management software.

RightNow Metrics—A performance evaluation tool allowing immediate feedback on the quality and timeliness of an organization's online interactions. Using RightNow Metrics, customized surveys can be created and distributed.

RightNow eService Center—An automated Internet customer service and technical support solution for customer care. RightNow eService Center handles customer service requests through three modes of query: self-service, email response management, and Live chat.
Also called *eService Center*.

rnm_dbaudit—A utility that automatically upgrades RightNow Metrics tables in the database from previous versions of the software.

Scoring—A function for specifying scores for each answer choice of a question. Email notifications can be sent to appropriate personnel if the score of a question or survey is abnormally high or low. This function allows organizations to track survey totals and percentages and run online tests.

Sending and receiving—A survey status used to allow surveys to be sent and received. Staff members choose this setting for an on-going Closed-Incident survey. This status applies to Closed-Incident surveys only.

Sending rules—A system of rules that must be used to trigger the sending of Closed-Incident surveys. The criteria of the rules correspond to the incident fields contained in the trigger email sent by eService Center or another customer relationship management package.

Short answer —A question type that is used for open questions without specified answer choices. Survey participants answer in their own words.

Single-page layout—A layout type for surveys distributed by email in which all questions are on one page.

Solved—An incident status type and status. Incidents marked Solved have been resolved. Closed-Incident surveys are automatically emailed to your customers after the questions they submit have been answered and their incidents have been solved by a customer service representative.

Space—A question type that is used to add extra lines between survey questions.

Standalone—Any device that does not require support from another device or system. RightNow Metrics can be installed in standalone mode or integrated with RightNow eService Center or another customer relationship management package.

Survey type—A RightNow Metrics survey designed for a specific audience. Two survey types are available in RightNow Metrics: Closed-Incident and On-Demand.

Survey Workbench—A console in RightNow Metrics for creating and modifying survey layouts and launching surveys.

Targeted responses—A field on the Addresses page that lists the number of surveys received and associated with each email address. This number does not include anonymous responses.
See Anonymous tracking.

Targeted tracking—An option in an On-Demand survey distributed as an email link or email HTML. In targeted tracking, only those persons who were specifically sent the survey are allowed to respond. The email addresses are placed in the database, and a list of the email addresses for those who responded to the survey can be viewed.

Text—A question type that is used to add text or graphics between survey questions. A text block can be used to add instructions for upcoming questions or to add design features to enhance a survey.

Trigger email—An email that is automatically sent to a customer whose incident has been closed (solved) by a customer service representative. The trigger email can contain the survey or a link to a Web-based survey.

UNIX—A multitasking operating system that originated in 1969 at Bell Labs. Written in the C Programming Language, UNIX is very portable and runs on a number of different computers. UNIX is the main operating system used by Internet host computers.

URL—universal resource locator. An address for a resource on the Internet. URLs are used by Web browsers to locate Internet resources. An example of a full URL is http://www.rightnow.com.

Wizard—An interactive help utility within an application that guides the user through each step of a particular task. RightNow Metrics provides wizards for creating questions, libraries, and surveys, and for launching surveys.

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